Welcome to Hansoft Project Manager

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Hansoft Project Manager covers a wide range of functionality. Dependent on your role, different sections may be of interest to you.

For project managers

- Read through Administration to familiarize yourself with the administrative tools
- Get an overview of Getting started with Agile planning, Task Scheduling, or Quality Assurance components

For team members, clients, and outsourcing partners

- Read through the information about the Using the To do list or Reporting bugs.

Administration

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In this section

Creating and managing users

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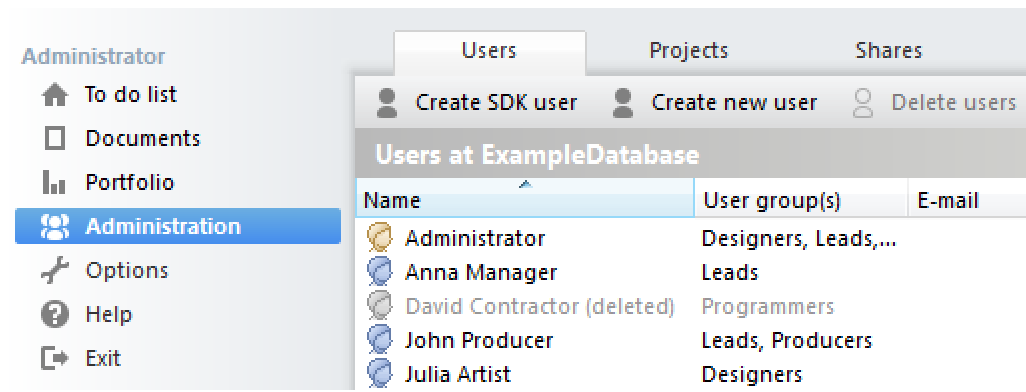
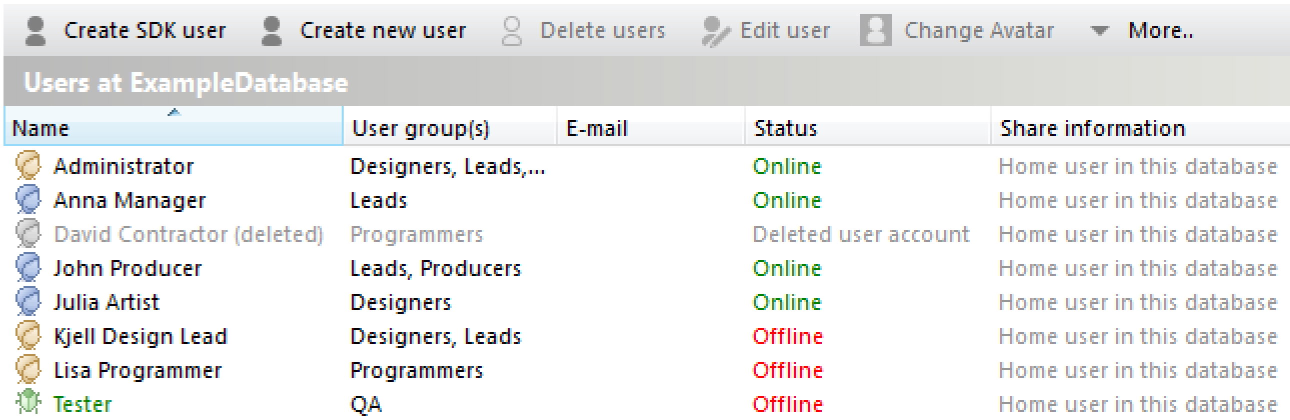
This section of the application is found under Administration in the left-hand navigation pae.



The administration section of Hansoft

The user list



The user list

The User list shows all users in the current database. In addition, deleted users who had their allocations and tasks retained will also be displayed.

- Name shows the full name of the user.
- User group(s) shows the groups that the user belongs to. Read more about allocation and user groups in the Portfolio allocations section.
- **E-mail** is used for automatic messages sent from the Hansoft Project Server. This is a cornerstone in a solid two-way communication between the project manager and the co-worker and for synchronisation among the co-workers themselves. Read more about activation and usage of E-mail in E-mail configuration.
- **Status** shows if the user is currently logged on to their account.

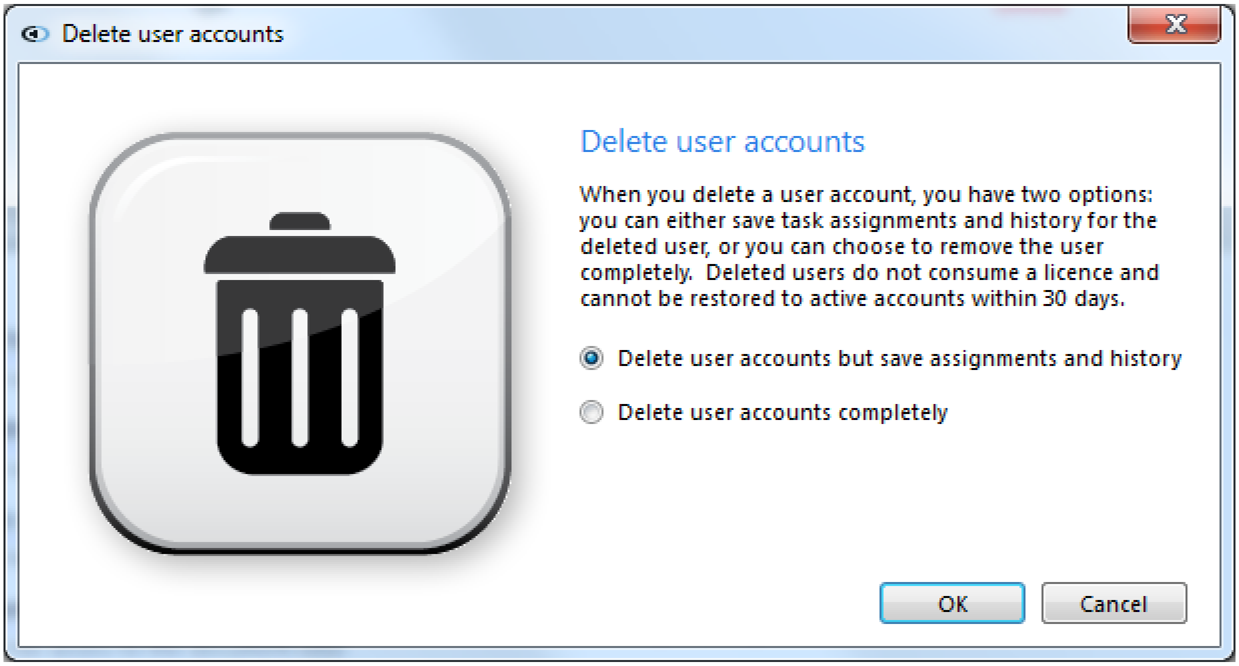
Creating a user

Create a user by clicking the "Create new user" button on the toolbar. Fill in the name, title and password for the user. When you create a user you also create an account on the project server where your user can log on. In this account the user will find all their work planned in the To do list.

Tip 1: Name your user with his/her full personal name, for example John Smith.

Tip 2: After you have created the user, go to and configure the profile settings for your user.

Deleting a user



When deleting a user, a choice can be made to retain assignments and task history. Otherwise, the user will be permanently deleted, with no option to restore them.

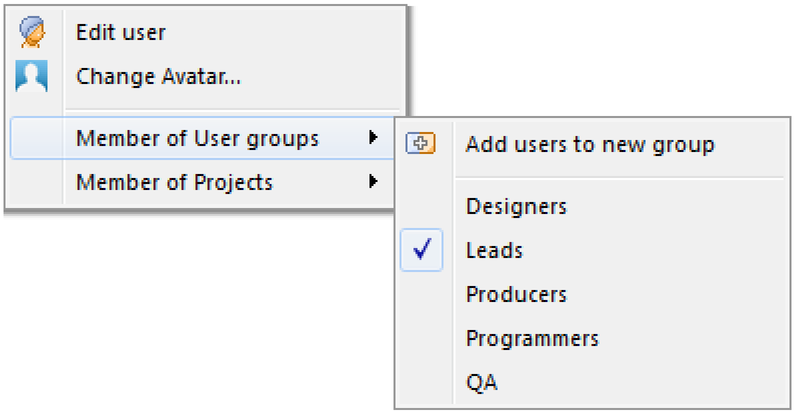
When you permanently delete a user, all references in the projects where they have planned tasks will be removed, as well as their account on the project server. This operation cannot be undone, so be careful. Additionally, be mindful of any repercussions related to the SDK, or to any integrations that might be affected.

Editing a user

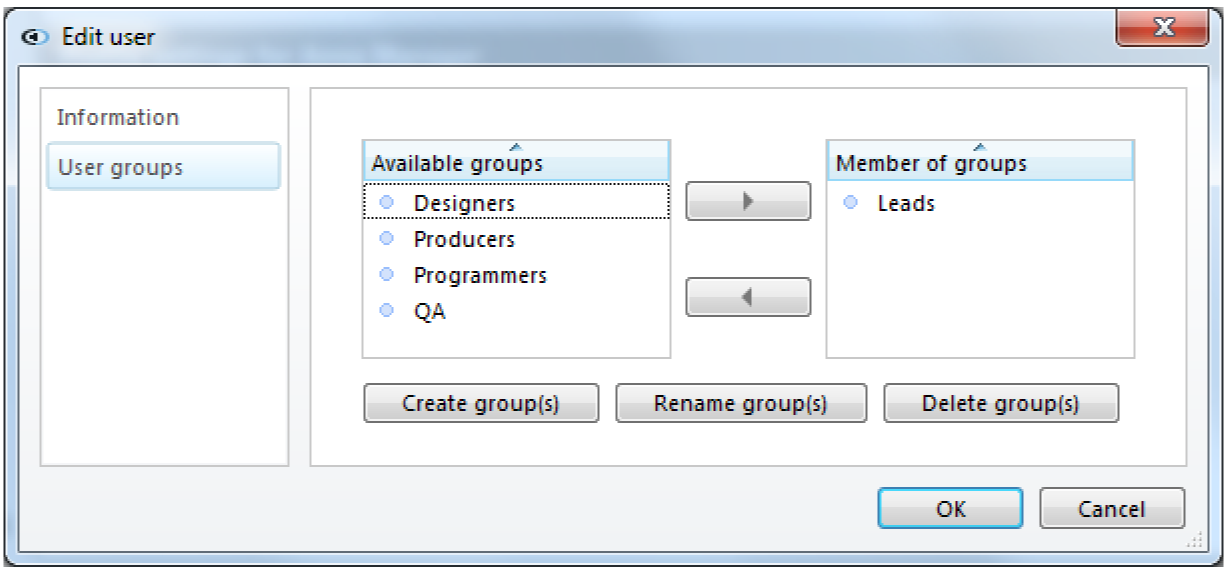
You can edit the properties of a user by clicking the Edit user button on the toolbar. You can change the name, title and password for the user. When you change the name of the user, all references to this user in the project planning will also be updated.

Adding a user to a group

There are two ways to add users to a group: Either by right-clicking the user and selecting the groups via the Member of User groups menu (where you can also create a new group), or by using the Edit user dialog.



Adding a user to a group using the context menu



Adding a user to a group using the User groups section of the Edit user dialog

Convert ghost users

See Ghost users

QA accounts

See QA user accounts

User profiles

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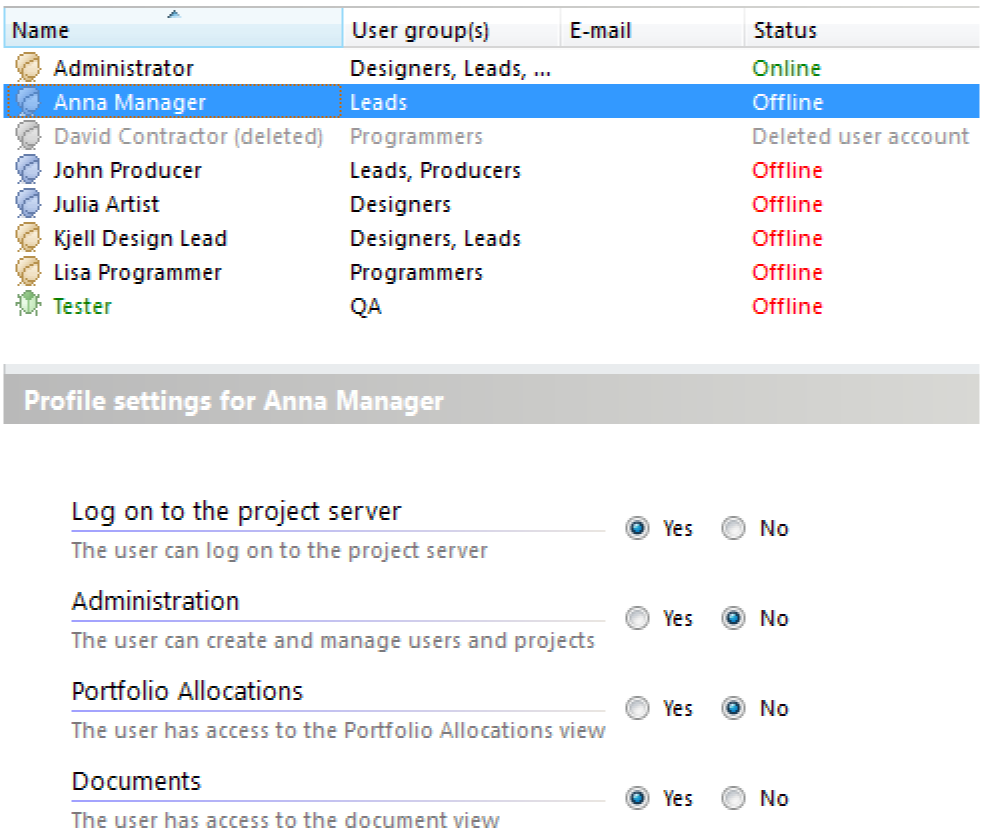

The profile settings section of the User administration panel

Every user can have their specific profile settings. This is a cornerstone in controlling what the employees have access to. For example, project managers normally have access to Portfolio allocations but co-workers do not.

When you change the profile setting, it has an immediate effect on the user account.

Tip: When you have finished with the profile settings for the user, proceed to create a project and add users to your project.

The list of projects

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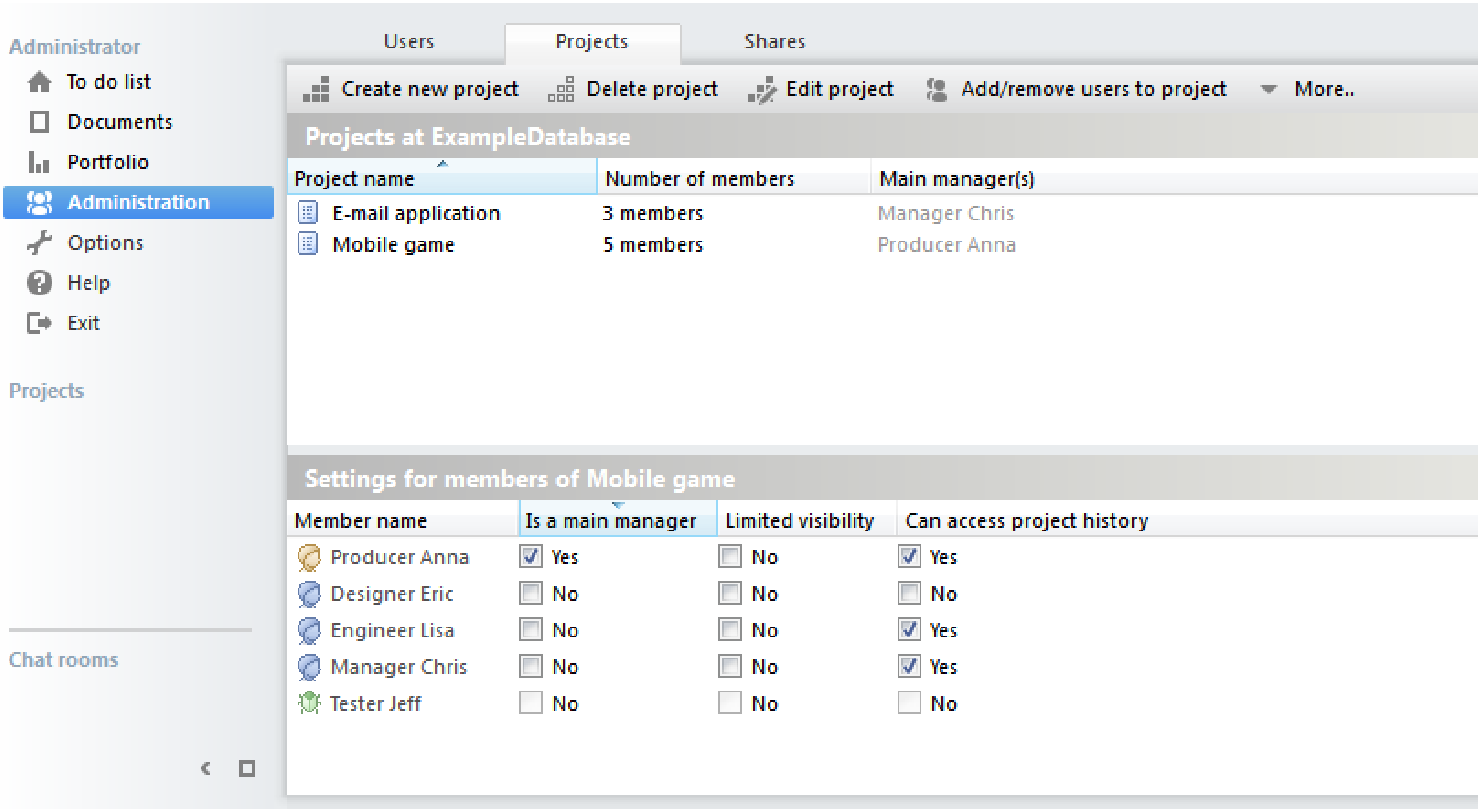
The list of projects is located below the main projects toolbar. It shows all currently existing projects.



The list consists of three columns:

- Name shows the full name of the project.
- Number of members shows the current number of users that are members of the project.
- Main project managers shows the current main project managers of the project.

Read more about main project managers, sub project managers and other profile settings for project managers here.

Creating and managing projects

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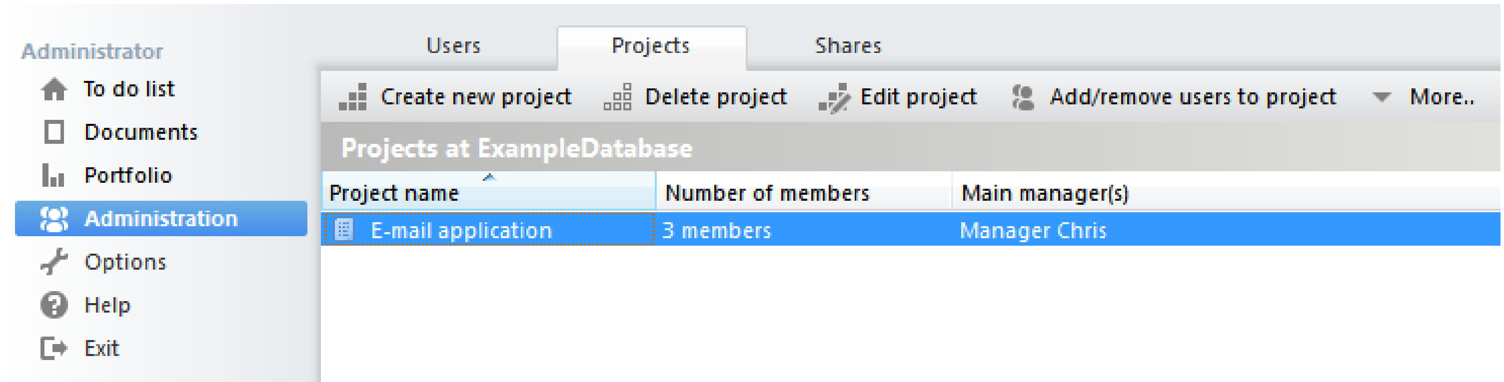
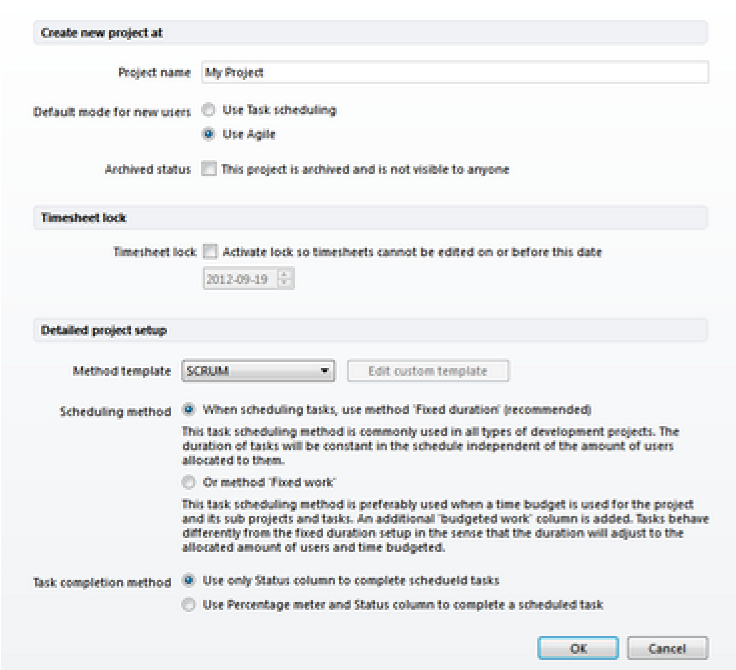
Projects are created and managed in the Projects tab of the Administration section of Hansoft.



The Projects tab in the Administration section

Creating a project

Create a project by clicking the Create new project button on the toolbar.



You can now choose between agile or task scheduling project methods as a default mode for the project. You can always switch between task scheduling and agile any time during the project life cycle.

If you have created an agile project, please chose an existing agile method template or create your own.

You can also select two different project methods with task scheduling: Fixed work and Fixed duration. Select the one that suits your needs. You can read more about the differences between the method in the Fixed duration and

fixed work section of this help manual. Also select how tasks should be completed, binary (yes or no) or percentage (0-100%).

Notice: The project you have created is empty. The application will now ask you if you want to add the users you have created to the project. If you want to do that now, jump to the Add/remove users to project section of this help manual.

Deleting a project

Select the project that you would like to delete and click on the "Delete project" button on the toolbar. When you delete a project, all associated data such as tasks, milestones and assigned work will be deleted permanently.

Warning: This operation cannot be undone!

Editing a project

You can change the properties of a project by clicking the "Edit project " button on the toolbar. You can change the name, department and project method. All changes will have immediate effect on the project server and to all clients connected to it.

Archiving a project

You can archive a project by clicking the archive flag in "Edit project". Archive when you are finished with a project. It removes all information from the To Do list, main application tab, users usage, etc. When you need to access it again, just remove the archive flag and retrieve the information you want (project history, schedule etc.).

Add/remove users to project

Jump to the Add/remove users to project section of this help manual.

Project user settings

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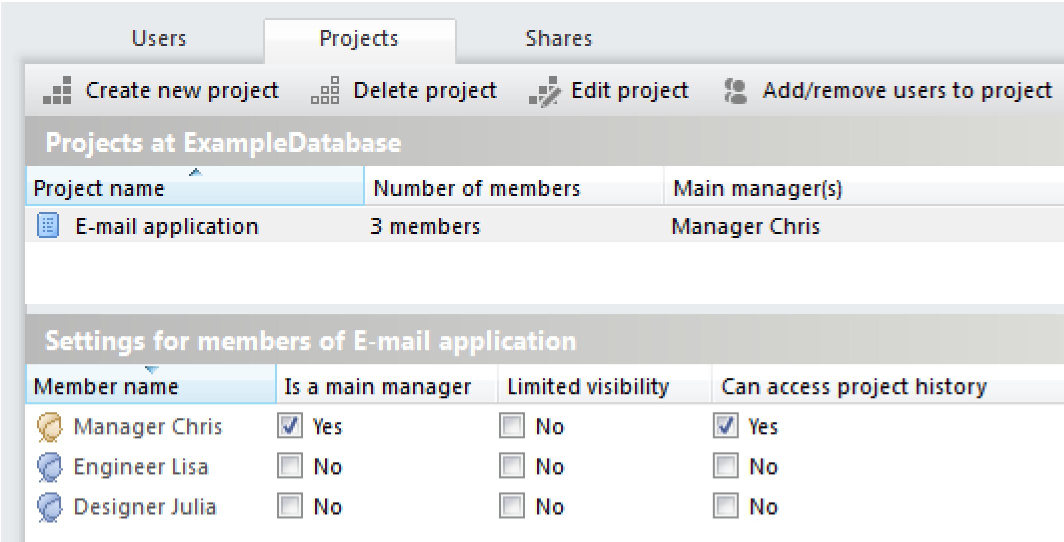
For every project, the users allocated to it each have profile settings associated with them, controlling what they can do in the project.



Profile settings in the Project administration section

Typically, a Main manager is someone who has the full access to the project and the project plan, and who delegates parts of the project to subproject managers. Any number of users can be main managers.

With Limited visibility enabled (as explained in Delegation and Limited Visibility section) the user cannot access any information beyond what has been explicitly made visible to them.

Additionally, users can be set up to access the project history.

When used in conjunction, Limited visibility and Can access project history is suitable for observers who might want to evaluate the performance of a development team. They take no part in the planning, but can evaluate things like milestone slippage.

Tip: When you have finished configuring the profile settings for users in the project, you can proceed to make a project schedule.

Allocating users to a project

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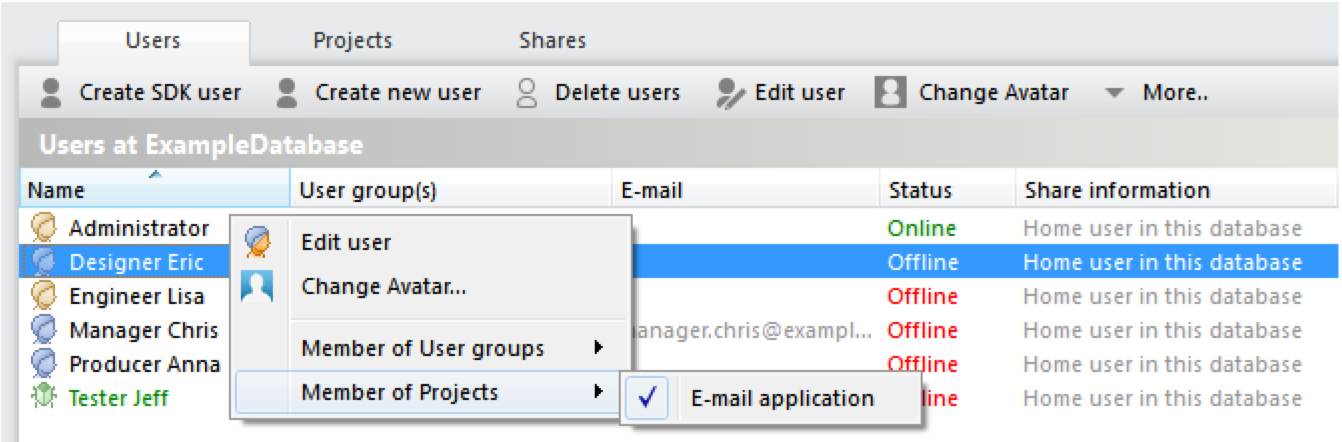
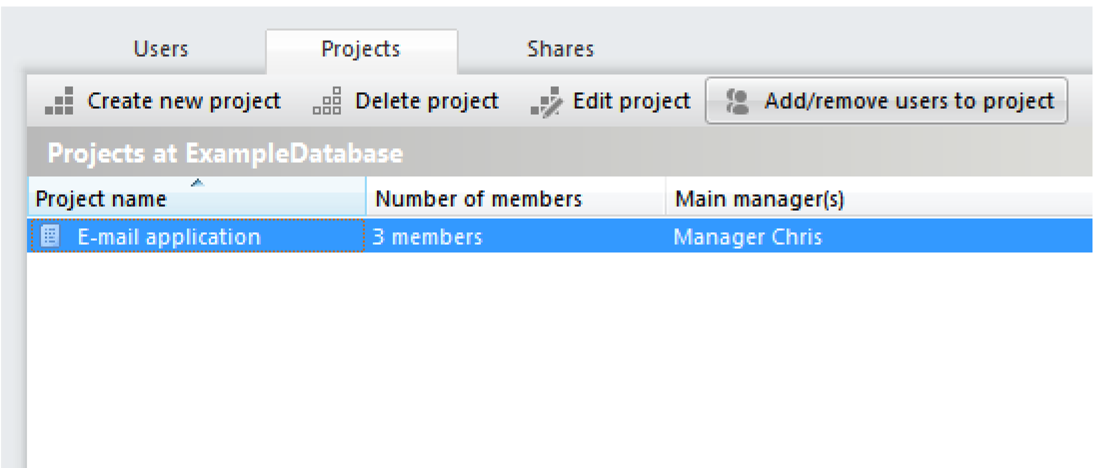
Adding a user

Users can be added to projects either by right-clicking their name in the user list and selecting the project directly, or by assigning them in the Projects tab of the administration section.

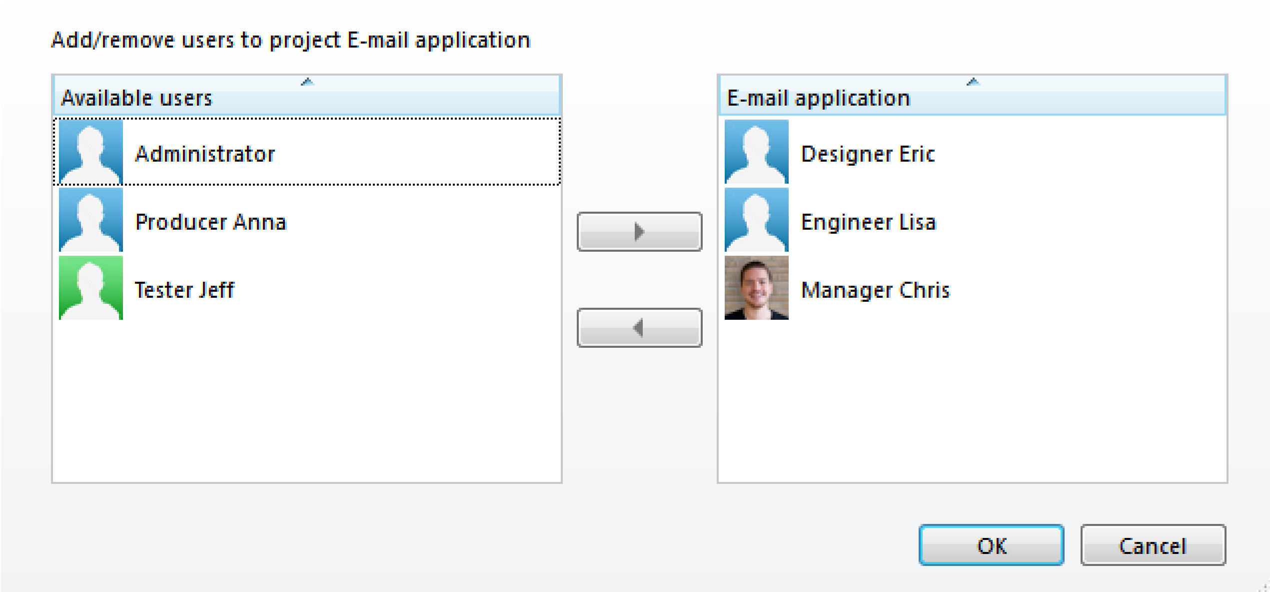


Adding a user to a project from the Users tab



Adding a user to a project from the Projects tab

Adding users can be done either by right-clicking a user in the Users tab, or by clicking the Add / remove users to project button in the Projects tab. This will show the user allocation dialog. Double-clicking a name will move it from available to allocated, or vice versa.



The user allocation dialog

Note: Users can take on different roles in different projects -- a user can be a main manager of one project, but a passive observer in another. This is determined by the project user settings. It is recommended that you review these settings after allocating a user.

Removing a user

Select a user in the project in the right column and press the "Remove user" button. When you remove a user from a project, all references to the user in the project will be removed.

Warning: This operation cannot be undone!

Security policy

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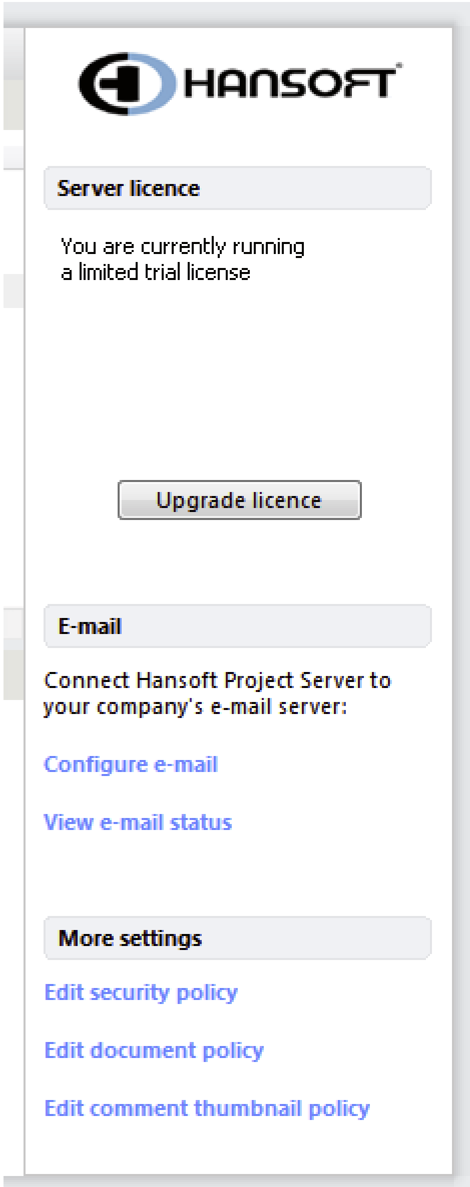
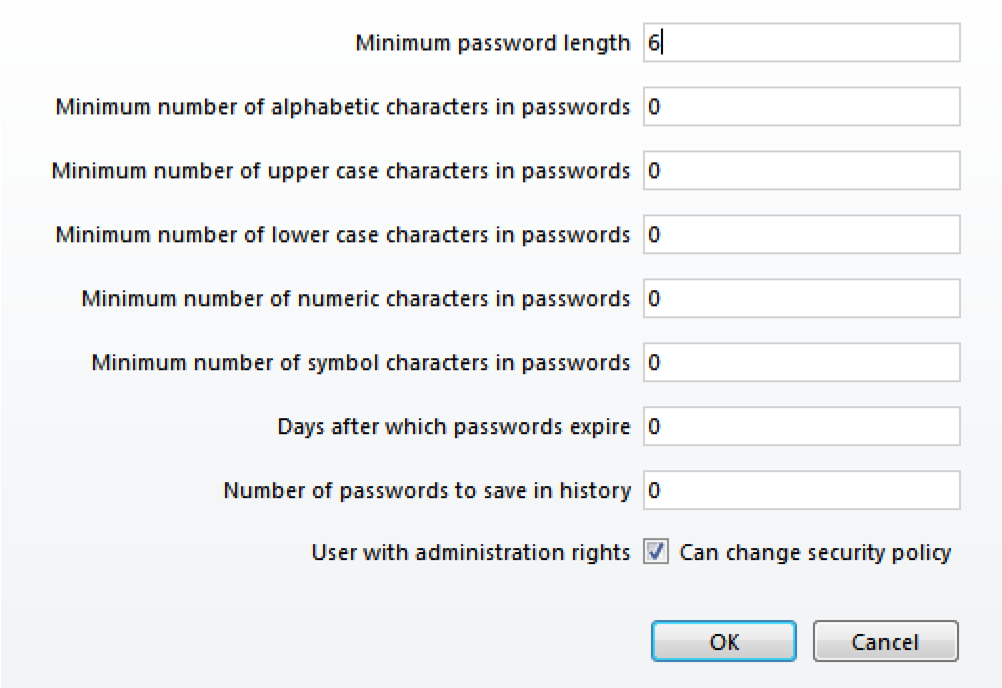
Hansoft features state-of-the-art security with 256-bit AES (Advanced Encryption Standard) for communication/storage and SHA-256 for password hashing. These standards are well established and AES is used by, for example, the US Government for "TOP SECRET" classified information.

The general security policy is set in the Administration section, by clicking on Edit security policy.



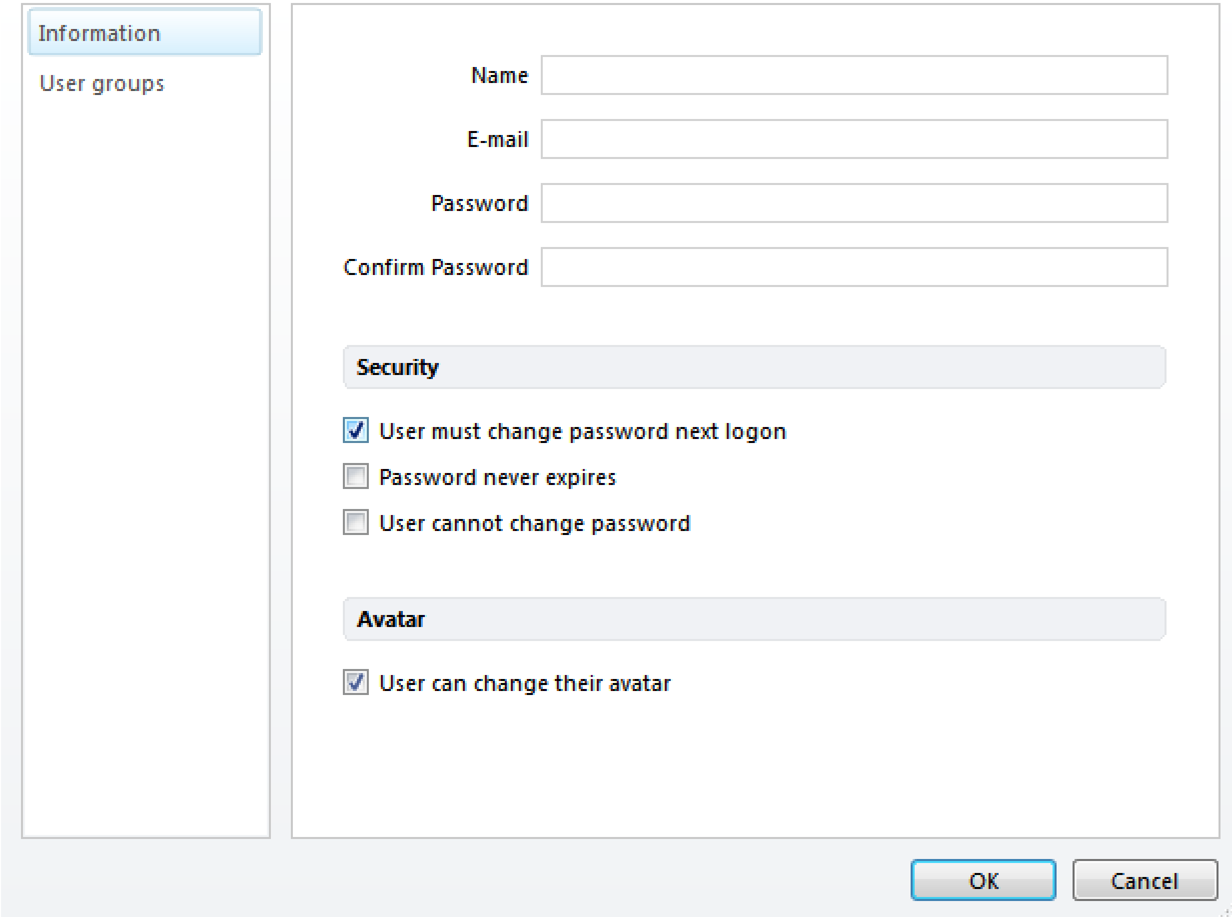
The Hansoft server license pane in the Administration section

The default password security policy is relatively non complex (for usability reasons) and it is recommended that you add complexity so that the password is harder to break by guessing (longer password length for example).



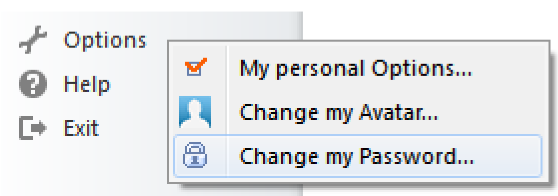
Editing the password security policy

Certain security policies can also be set on a per-user basis.



Editing a user

If a user can change the password, this can be achieved under his/her To Do list:



The Options menu in the Hansoft navigation pane

E-mail configuration

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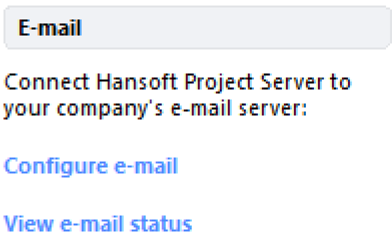
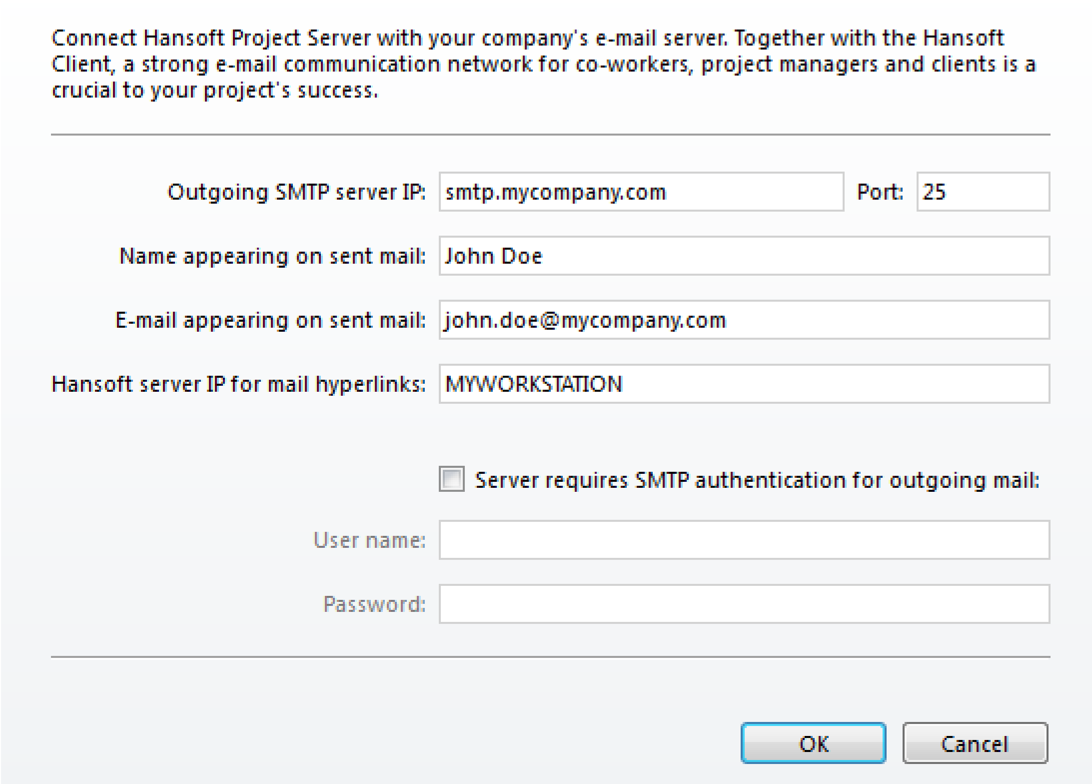
Hansoft can be configured to send an e-mail when a user's schedule is updated, before a milestone or when a task comment has been posted or edited. Project managers may, for example, get an e-mail when a task is completed.



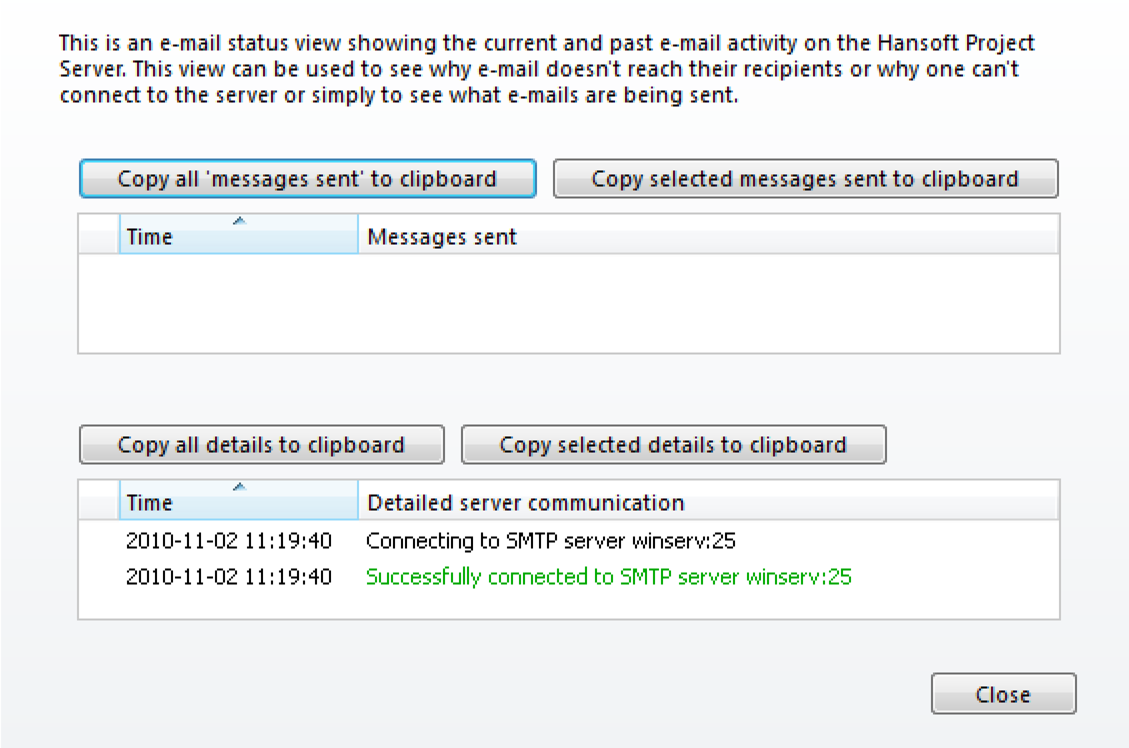
The Configure e-mail button

Configuring an e-mail server connection



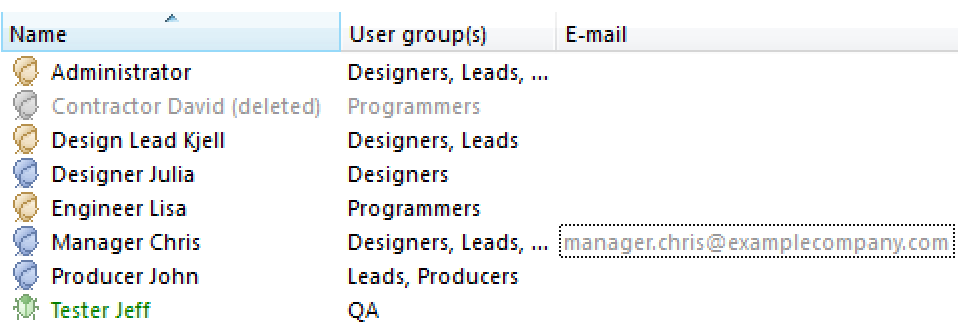
The E-mail settings dialog

The most important field in the e-mail settings dialog is Outgoing SMTP server name. This is what enables Hansoft to send e-mails. Once filled in, it can be verified by clicking View e-mail status in the Administration side-panel. A successful connection includes the line "Successfully connected to SMTP server."



A successful e-mail verification session

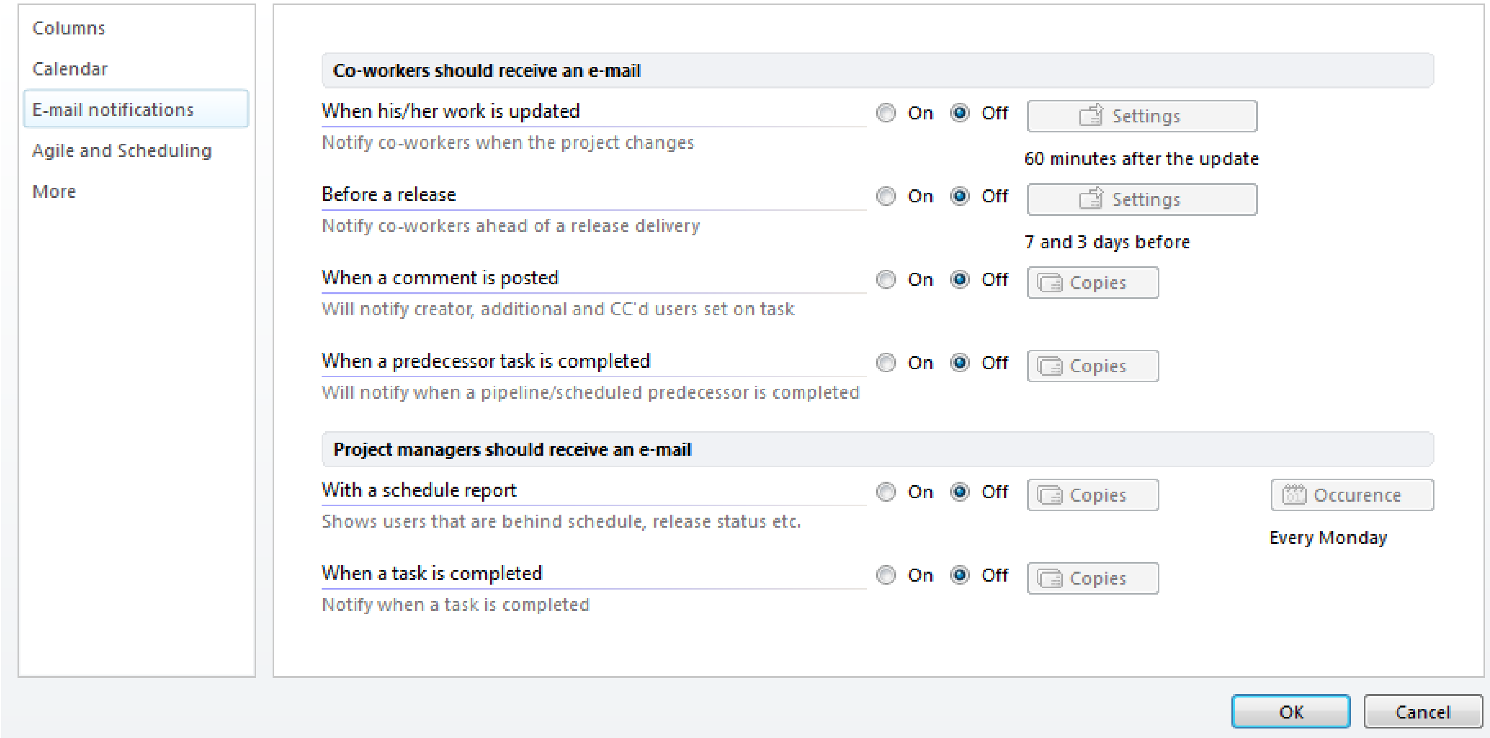
Setting user e-mail addresses



E-mail settings for users

With a valid e-mail connection set up, an administrator or a main project manager can specify e-mail addresses for users in the Users tab of the Administration section.

E-mail settings in projects



Each project (and the Quality Assurance section of each project) can have its own configuration for when and how to send e-mail.

Timesheet reports

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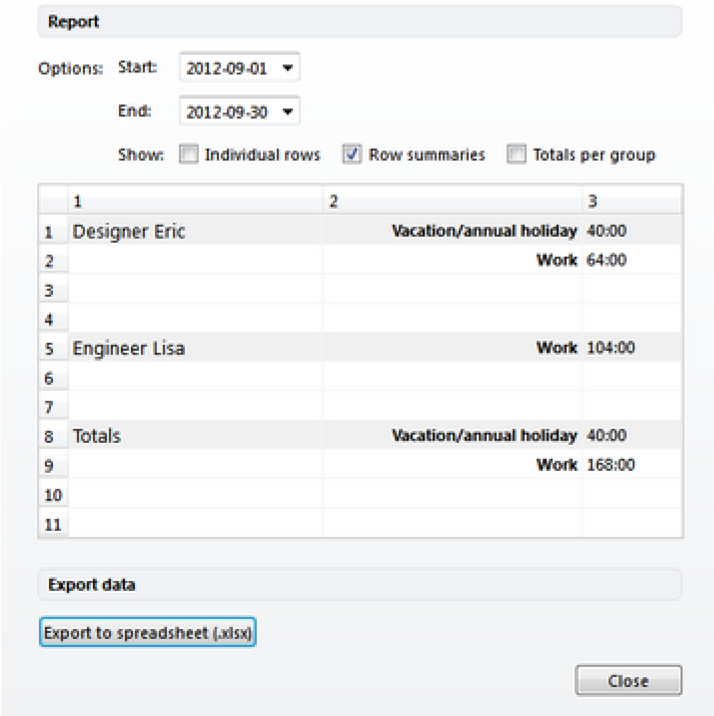
If Hansoft is extended with the time report module, every user has access to their individual timesheet in their To do list. A main project manager may also generate a summary of time reports from the Administration section.

Timesheet reports

Administrators can generate a user timesheet report is by clicking on Make a timesheet report in either the Users or Projects tabs in the Administration section. If done in the Users tab, a timesheet will be generated for the selected user(s). If done in the Projects tab, one will be generated for the selected project(s).



A project timesheet report

Tip: Timesheets may be locked in order to prevent data related to projects from being changed before a given date.

Customize timesheets

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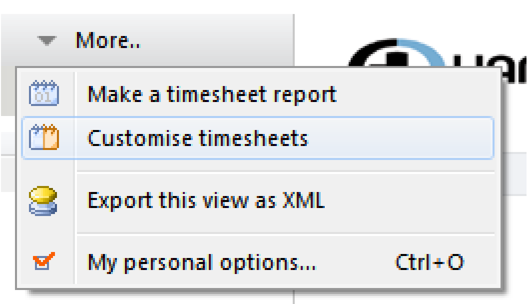
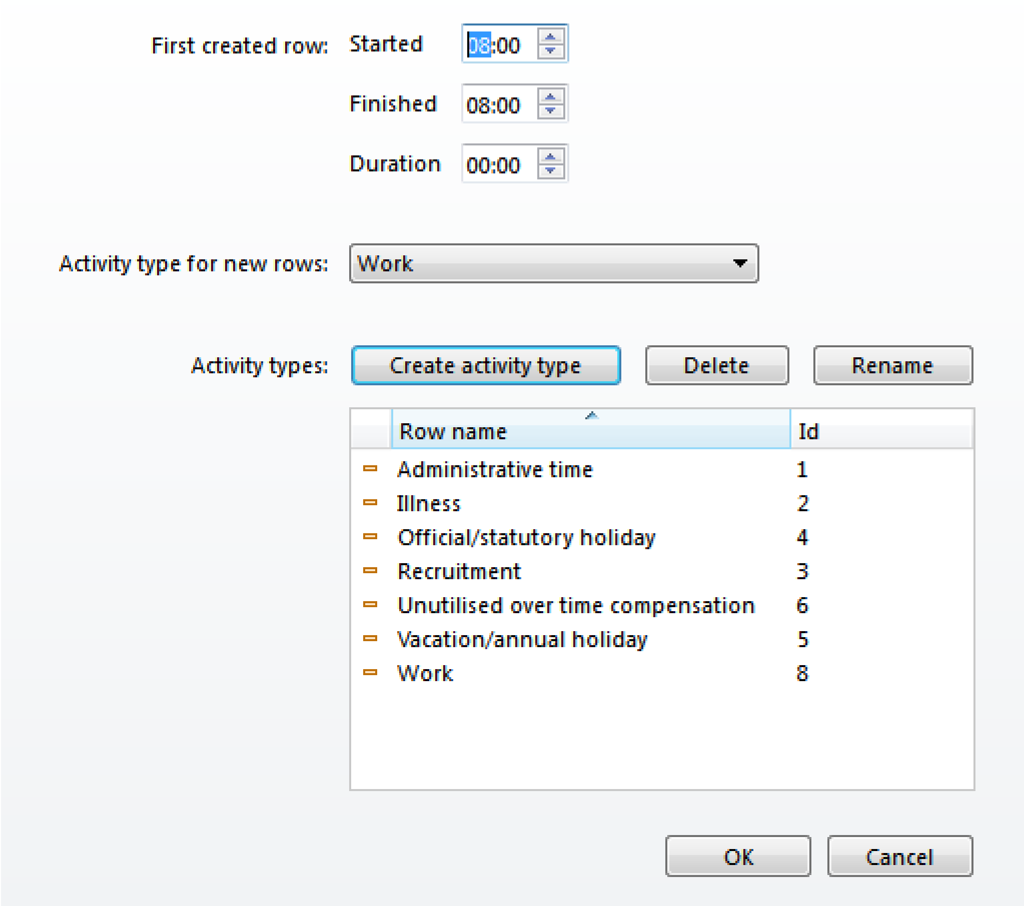


The Customise timesheets button

Timesheets can be customised by clicking Customise timesheets in either the Users or Projects tab of the Administration section. Customization includes setting default working hours and activity types for newly created rows in the timesheet editor, as well as naming and defining activity types available.



The customize timesheets dialog

Using the To do list

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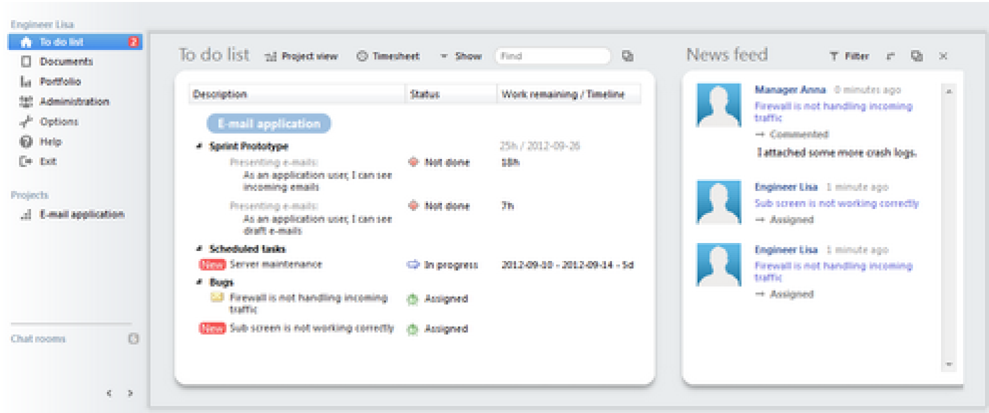
The To do list displays a summary of all tasks, items and bugs that have been assigned to the currently logged-in user, as



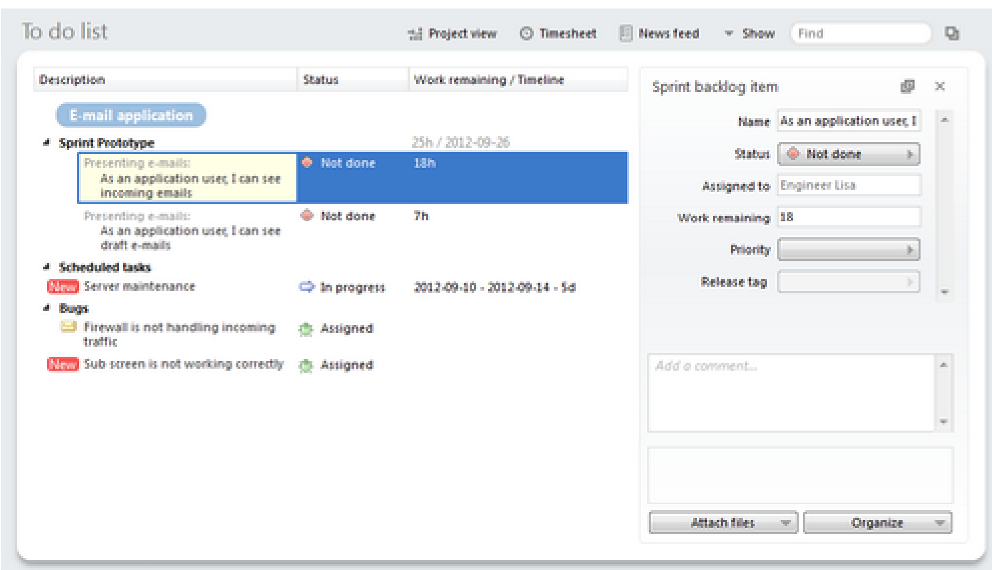
A typical To do list for a co-worker

The To do list

The To do list has separate sections for each project the user is a member of, which are further divided into sections for

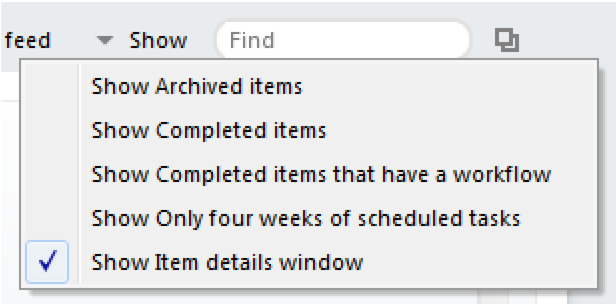
Any new items will be signified by a New icon, also increasing the counter on the To do list entry in the left-hand Navigat

Item details



The To do list with the Item detais window active

For more in-depth management of tasks, the To do list can show a Details window for the selected item. This is done by e



Enabling the Item details window

If the user wishes to see the item in its context, Clicking the Project view icon will display the item in the project view.

The News feed

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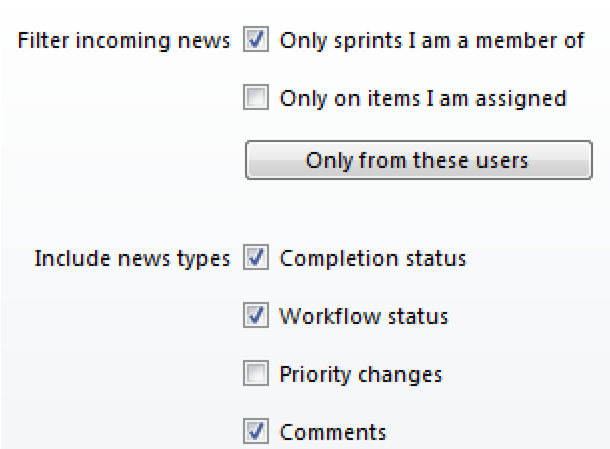
The News feed is a live stream of all the activity deemed relevant to the user. By default, it includes all activity (new / changed tasks, comments, priority changes) in any project the user is a member of, in any sprints to which the user has been allocated. To control the flow of information, the News feed can be filtered by clicking the Filter icon .



The Timesheet

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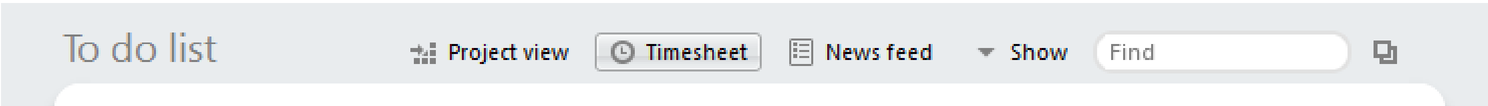
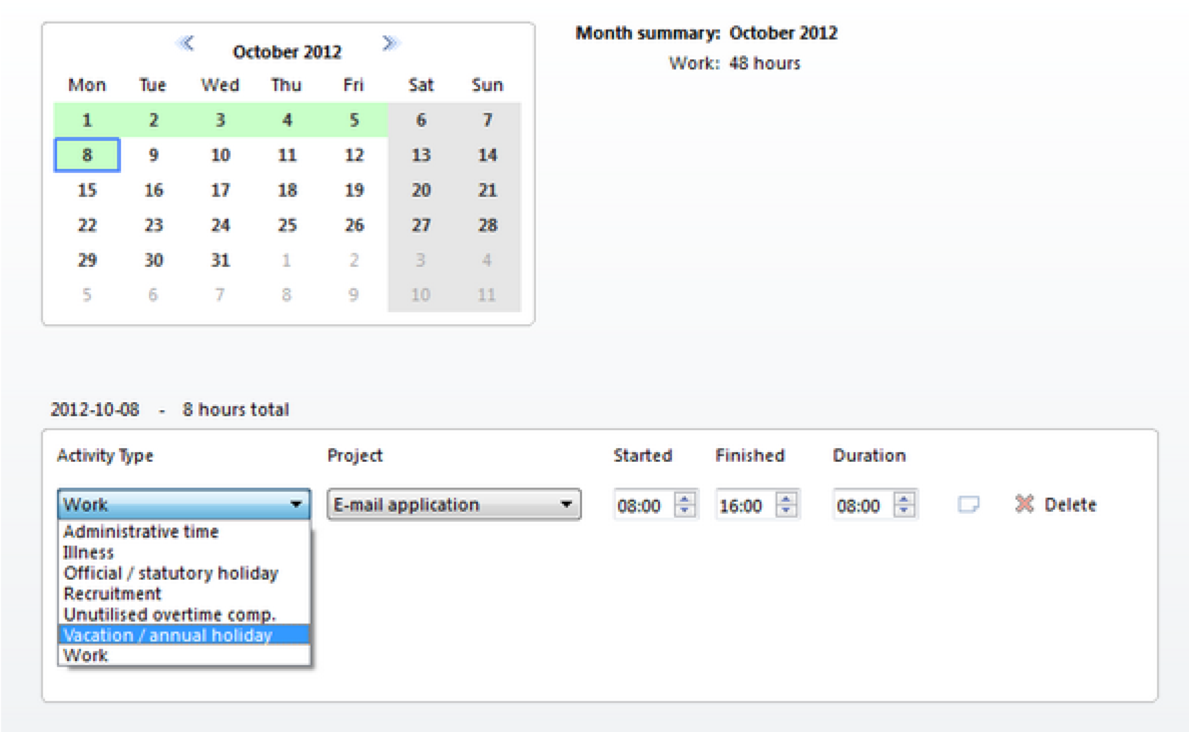
If Hansoft is extended with the time report module, every user has access to their individual timesheet in their To do list. A main project manager may also generate a summary of time reports from the Administration section.

Viewing the timesheet



The timesheet button

At the top of the to-do list is the Timesheet button, which brings up the Timesheet dialog.

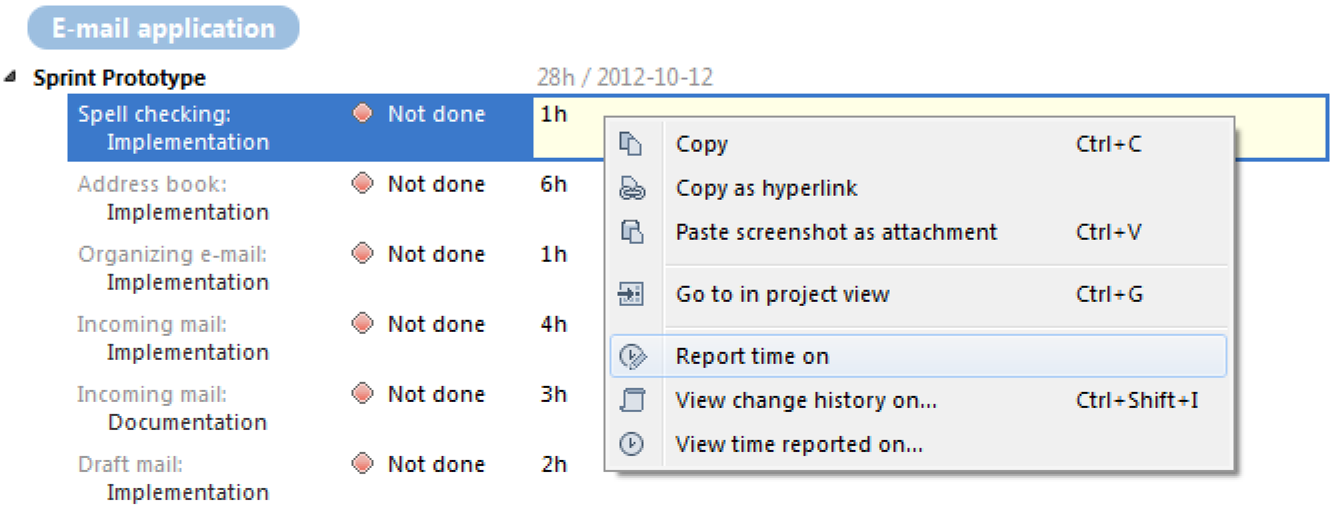


The timesheet dialog

The timesheet dialog shows a calendar, a monthly summary, and the list of time reporting rows for the selected day.

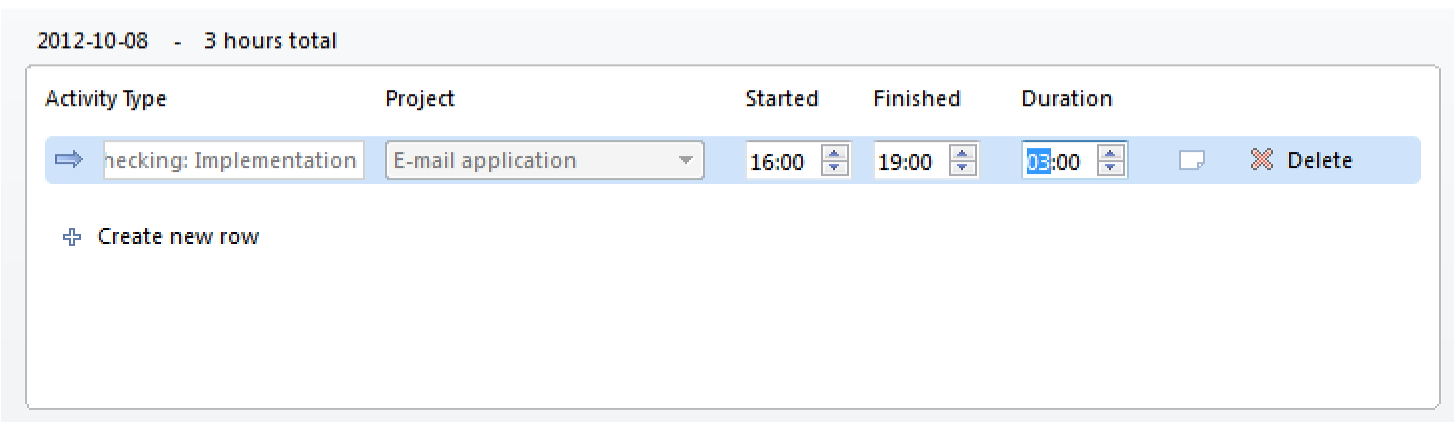
For each day, users can insert one or more rows to account for their activities. Activity types are customisable by the administrator, but the most common one is work. In addition, user may enter a project to which their time is to be accounted, as well as any comments for the timesheet row.

Reporting time on tasks



Reporting time on an individual task

When reporting time on an individual task, the Activity type and Project fields are pre-filled, leaving the user to specify hours for the task.



The timesheet row for an individual task

Agile and task scheduling

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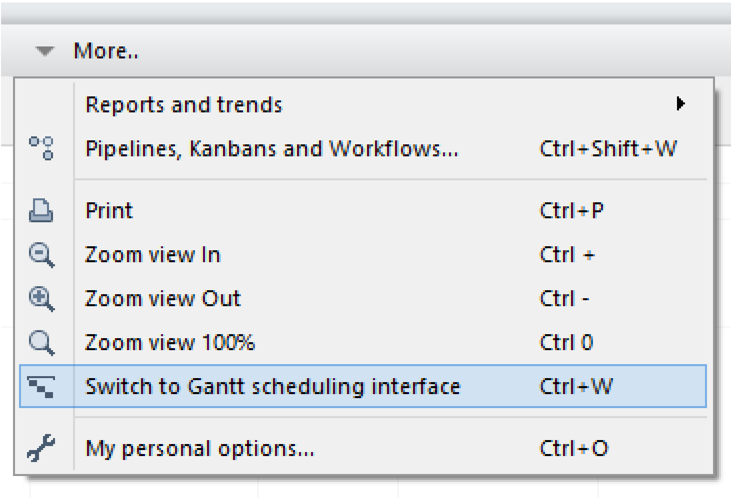
Hansoft has the unique feature of combining both agile and task scheduling in one project.

Whether to run an agile or task scheduling project is first decided when you create the project. This selection will then be the default mode for the project, which means that project members and sub project managers will be in

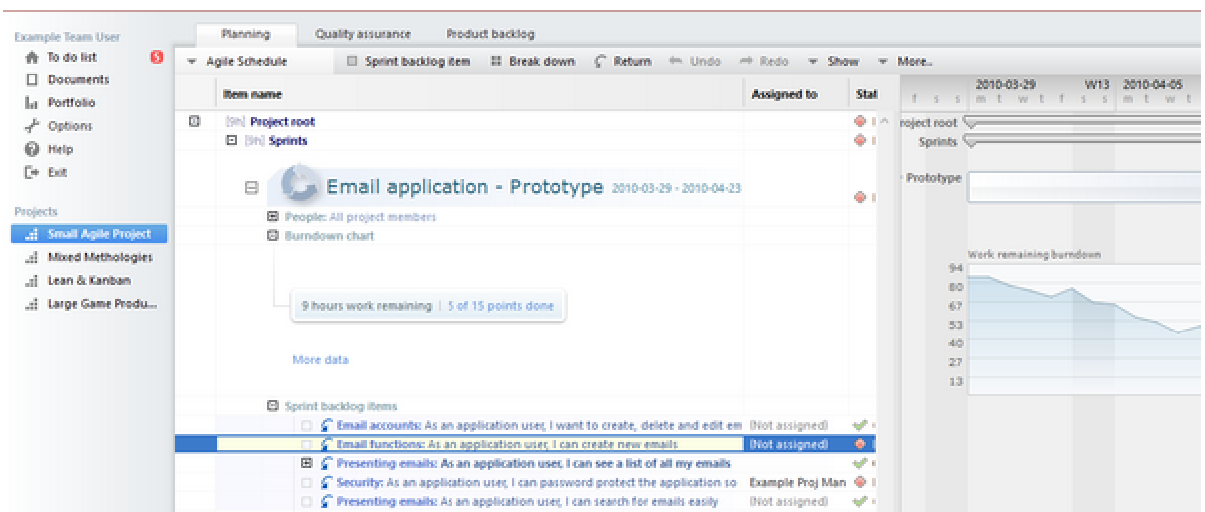
this mode when they connect to the project for the first time.

You can always switch between agile and task scheduling modes with keyboard shortcut Ctrl + W (Cmd + W), or via the More menu. This is a personal option that every member of the project can set.

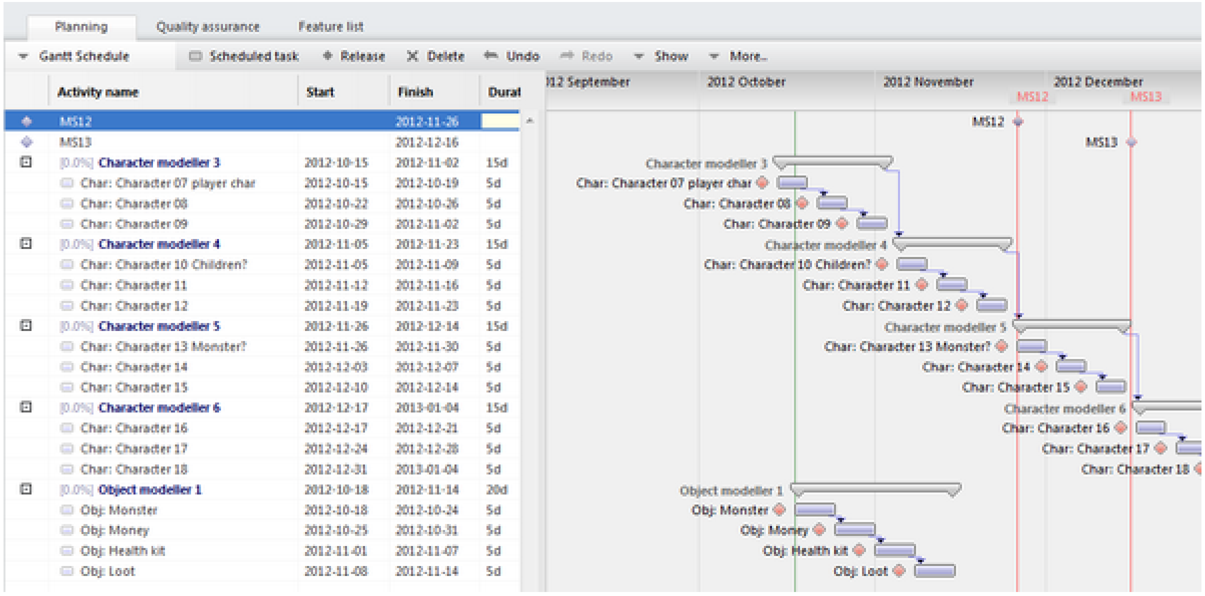


Switching between Agile and Task scheduling interface

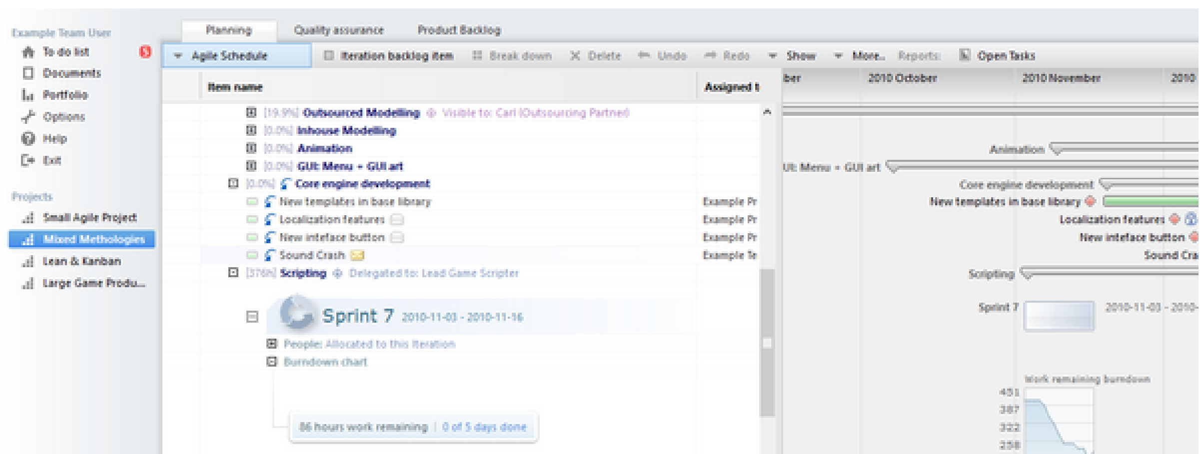
An agile project



A task scheduling project



A combined agile and task scheduling project



Getting started with Agile planning

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If you have decided to run your project in agile mode, this page will describe how to get started. SCRUM is used as the conventional name when describing agile within Hansoft.

Core components

- Sprints ("iterations" in eXtreme Programming) with specific sprint members, users and burndown charts.
- Sprint backlog items ("iteration stories" in eXtreme Programming)

•Sprint tasks

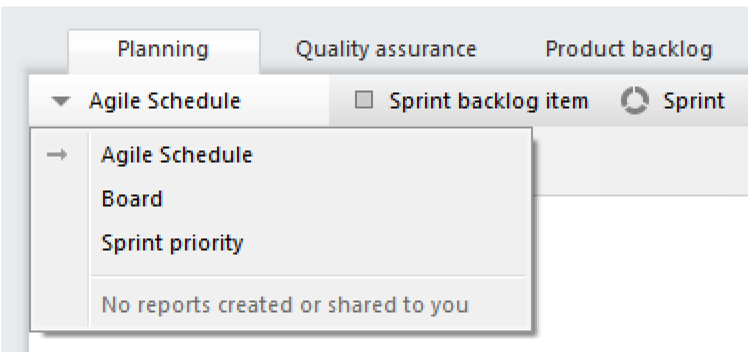
•Releases (often referred to as milestones)

•A separate product backlog with backlog items ("stories" in eXtreme Programming) that can be committed to a sprint

•Special customisable agile columns such as category, complexity points, confidence, estimated ideal days, priority, release tag, risk and user tag.

Agile views

In agile projects, you either work directly in the schedule view, on a board, or in a prioritised view. The schedule view offers the full, complete schedule for the project, with all sprints, milestones and items, while the Board and sprint priority views are specialized planning tools commonly used in agile planning.

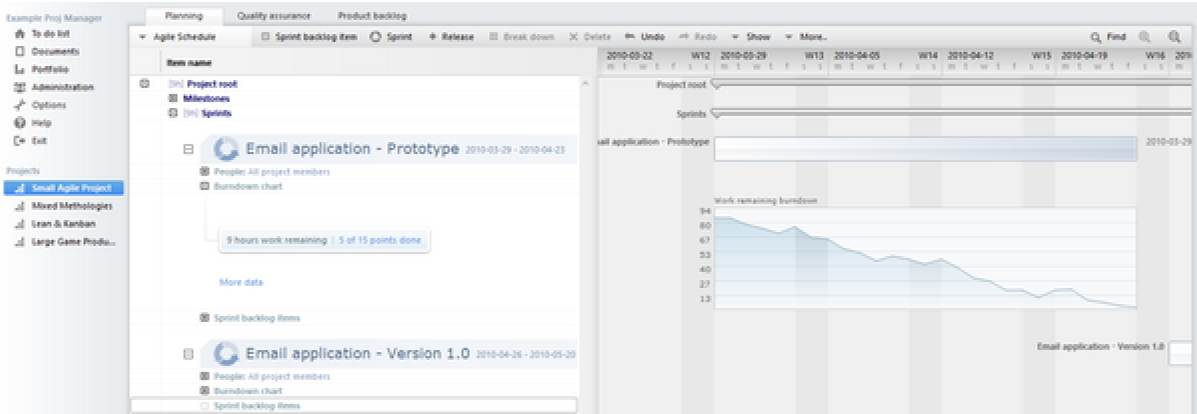


The schedule view selector

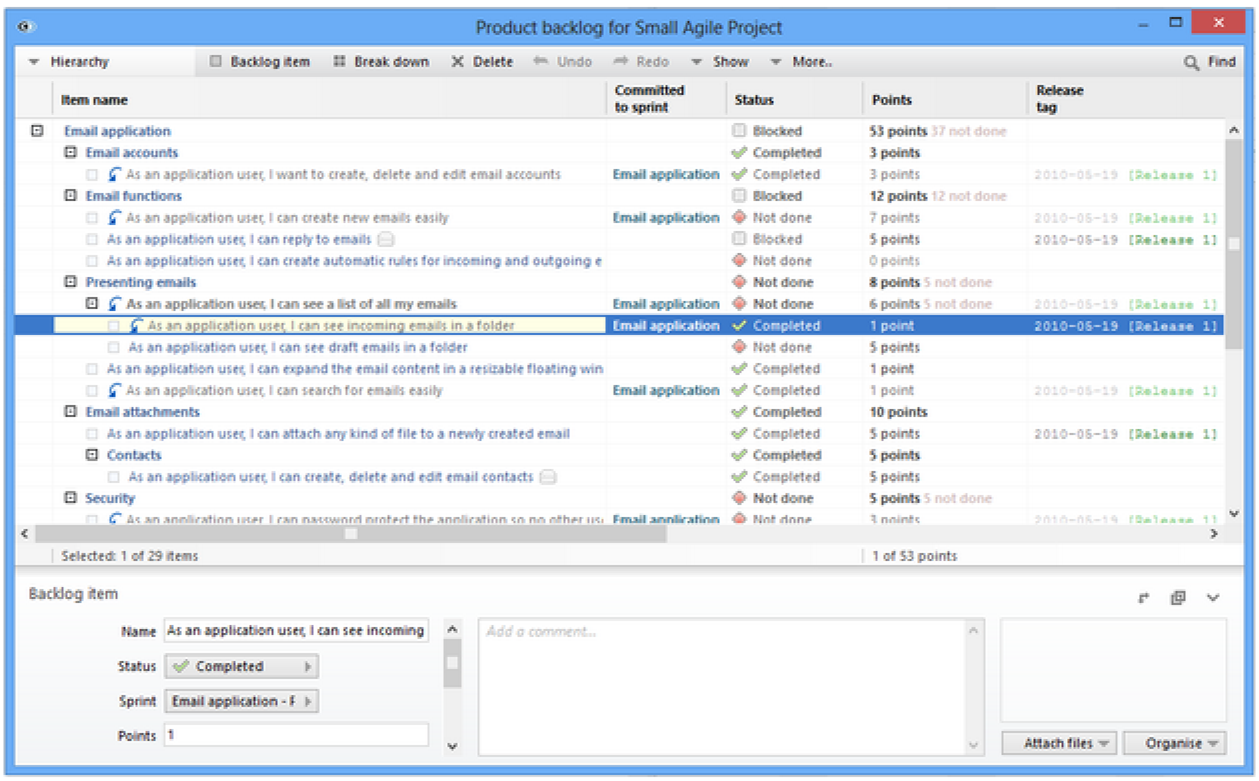
An agile project often starts either by doing sprint planning, or by constructing a product backlog from which user stories are committed to sprints.

Examples

A sprint has been added for the prototype phase of an e-mail application, and items have been committed from the product backlog. A burndown chart can also be seen.



In this screenshot, we have started our agile project by constructing a [main product backlog](). We have created backlog items (for example requirements, enhancements, bugs etc.) and later prioritised them in items sorted. Some of the items have been committed to a sprint.



Schedule view

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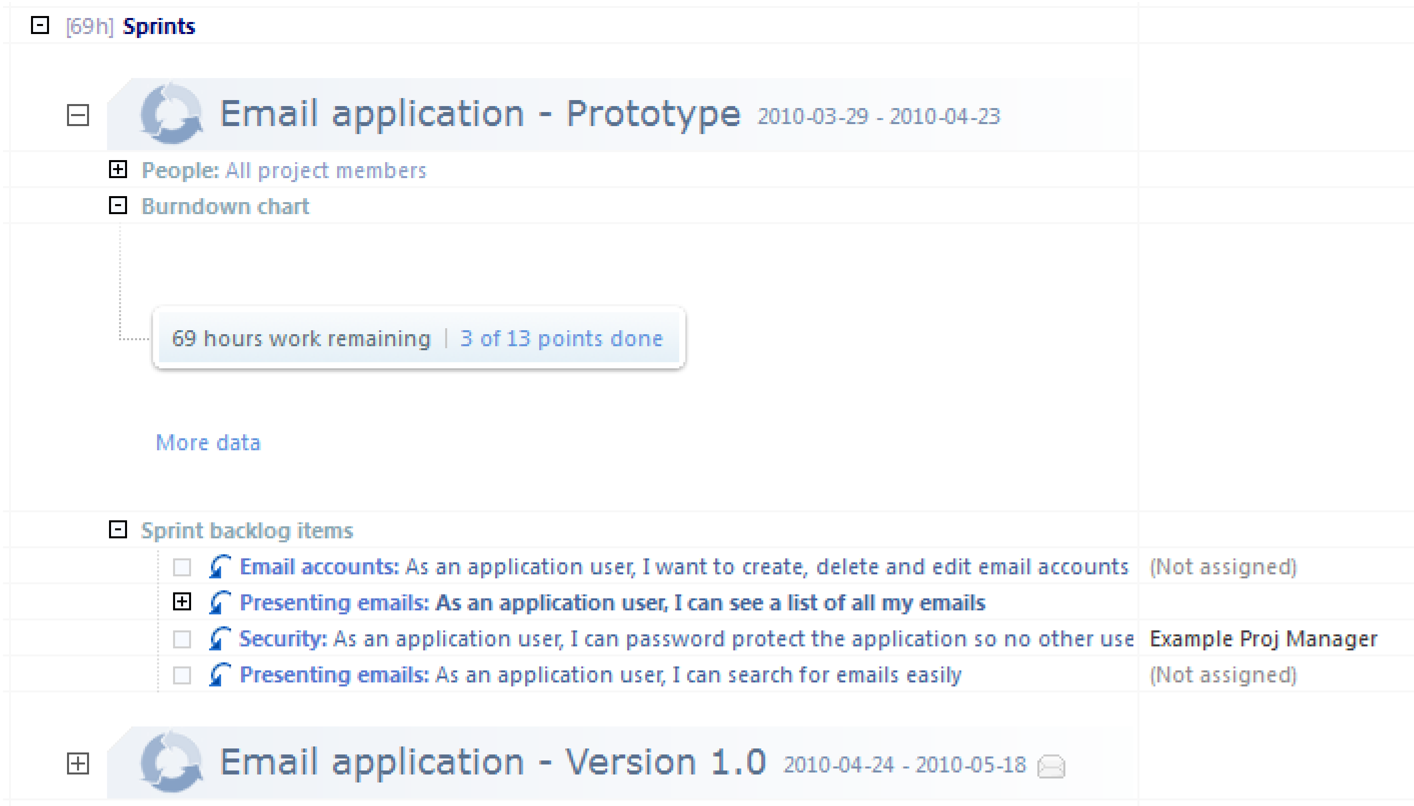
The main goal of this view is to create and structure items in a hierarchy. The hierarchy is often decided upon by how the team and product is structured.

The sprints can be customised with different columns that cover a large spectrum of agile needs. Please see the customise columns page for more information.



Board view

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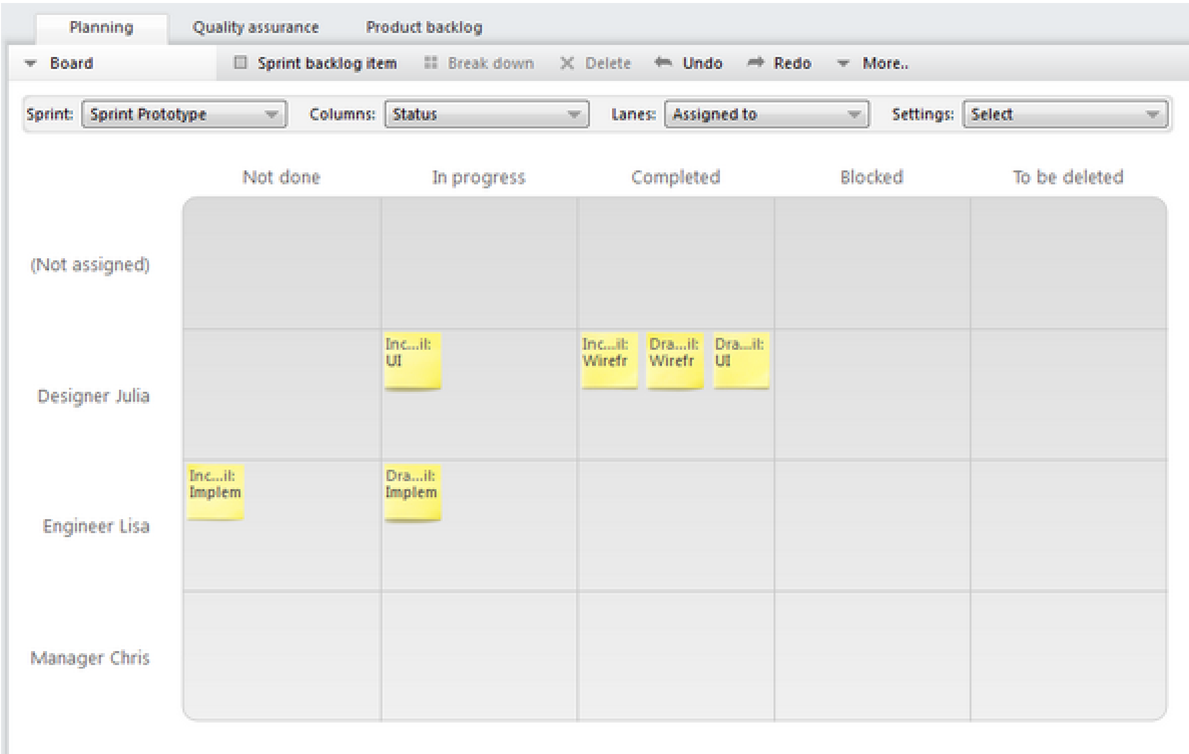
The main goal of the board view is to create, manage and analyse items by arranging them on a virtual board, simulating the large physical boards often used in agile projects. The board can be configured to display either a swim lane / column matrix, or a Kanban.



A typical Board view, with swim lanes arranged by user and columns by item status

The Board layout toolbar displays selection options for which Sprint (or Kanban) to view, what data to display on the Columns and Lanes, as well as Settings for the item cards themselves.

Sprint view

The sprint view is a matrix of Columns and Lanes. Select a sprint in the Sprint selector, then choose what item data should be represented by the columns and lanes respectively. The board can be zoomed with the mouse wheel, and dragging with the right mouse button will pan-and-scan across the board.

Kanban view

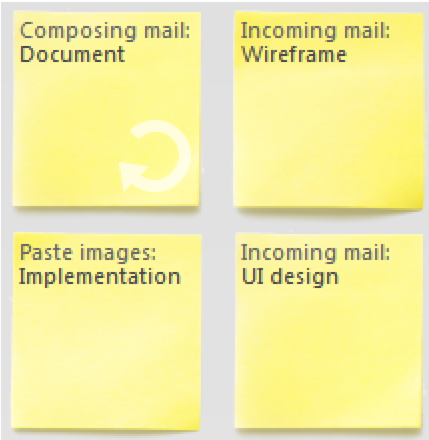
The purpose of the Kanban view is to display all items allocated to a particular type of pipeline. Viewing items in this way allows users to quickly evaluate their work, and to identify and correct bottlenecks should the need arise.

For an in-depth description of the kanban view, read the [Kanban chapter](#) of this manual.

Board items

Each item on the board represents a task in a sprint or a pipeline. If the item has been committed from a product backlog, it will be indicated by a backlog icon. Selecting the item and pressing Ctrl + G (Cmd + G) will reveal that

item in the product backlog.



A board item committed from the backlog

Sprint priority view

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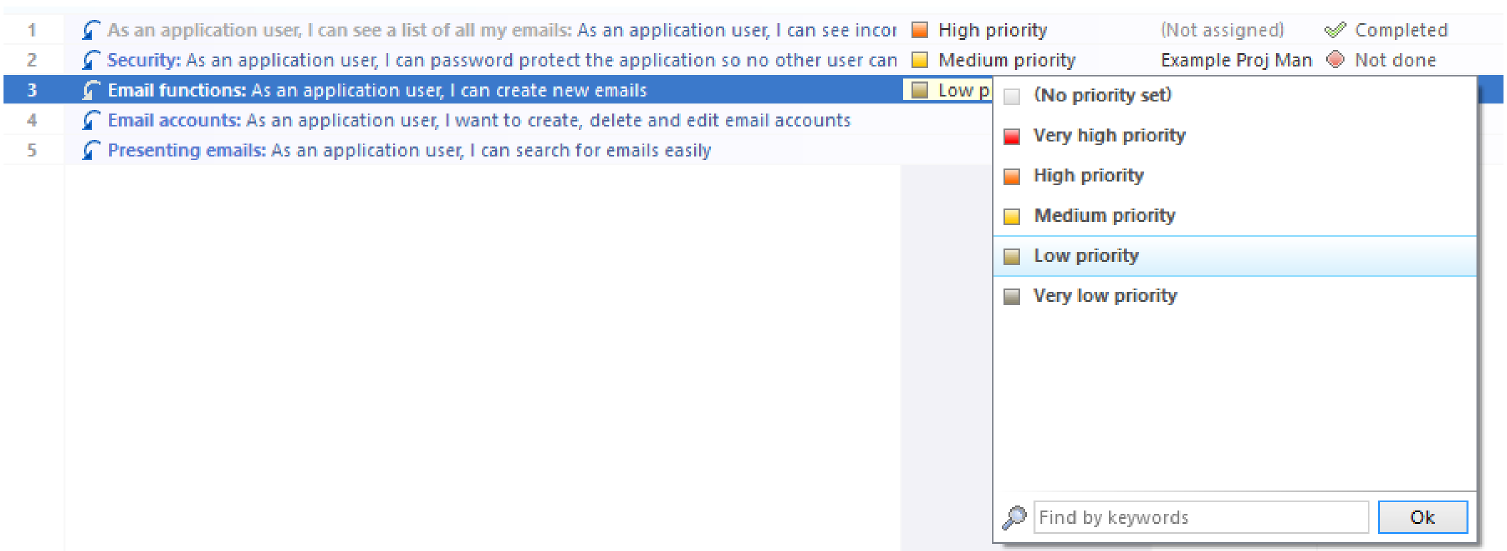
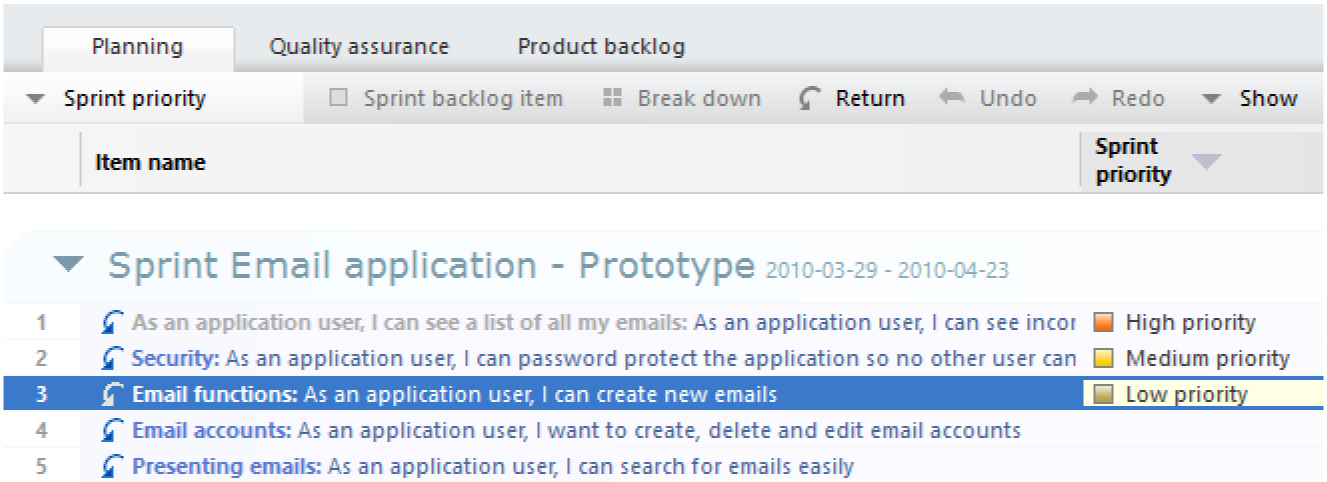
Normally, sprint backlog items will be entered into the Schedule view, or committed to it from the product backlog. The Priority column can then be used to prioritise them. The priority will also decide the order of item in each co-worker's To do list.



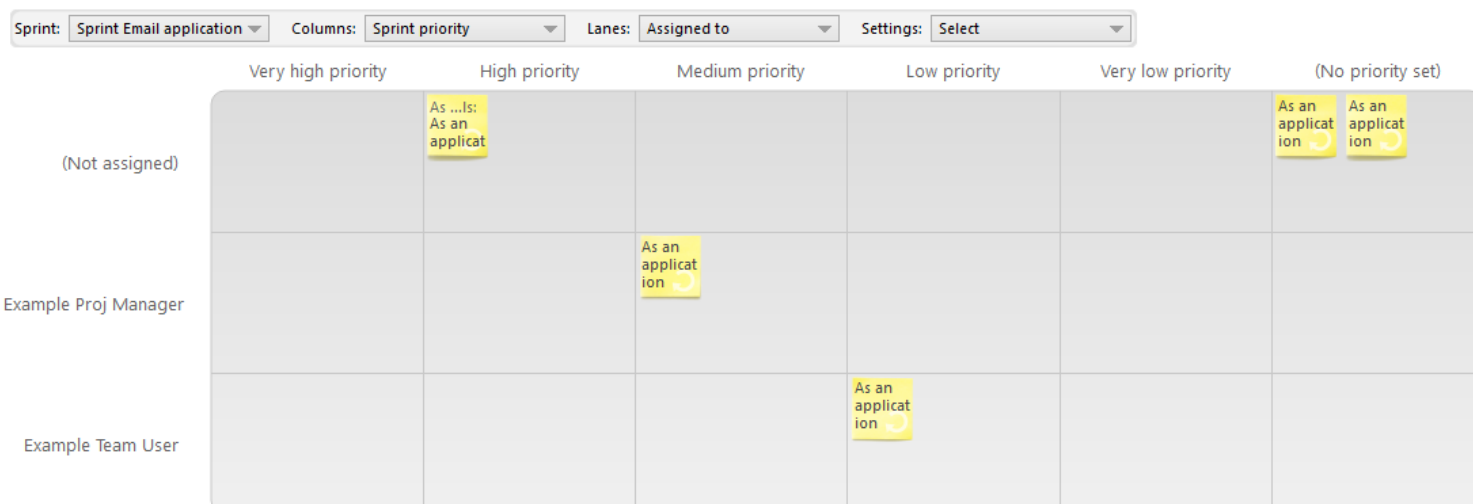
Setting item priority in Schedule view using the Priority column

To make prioritising items easier, planning can also be done using the Priority view. In this view, item priority is set simply by dragging items up and down. They will inherit the priority of the items surrounding them.



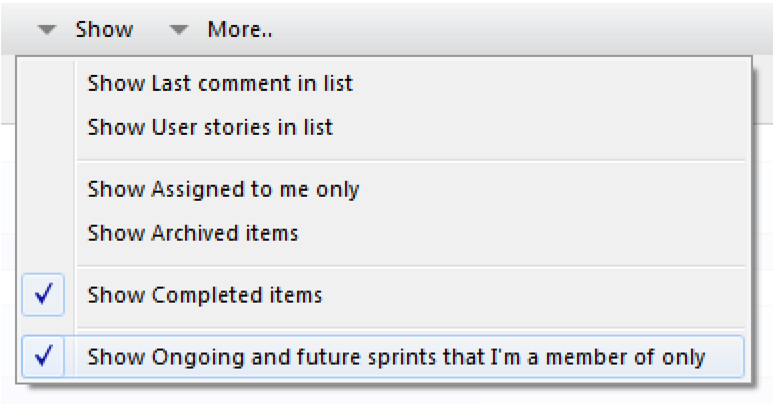
The sprint priority view

Furthermore, the Board view can be configured to use priority either as a column or as a swim lane.

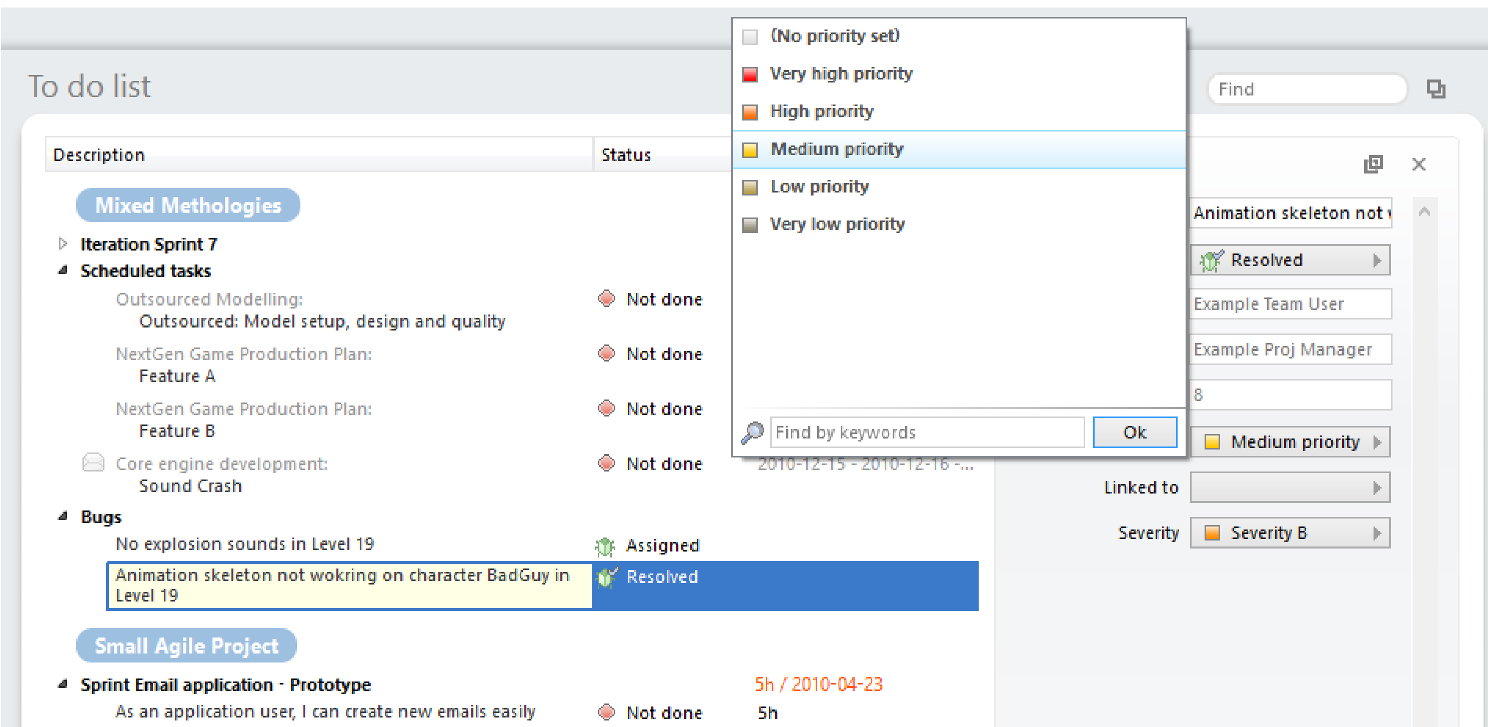


Sprint priority in the board view

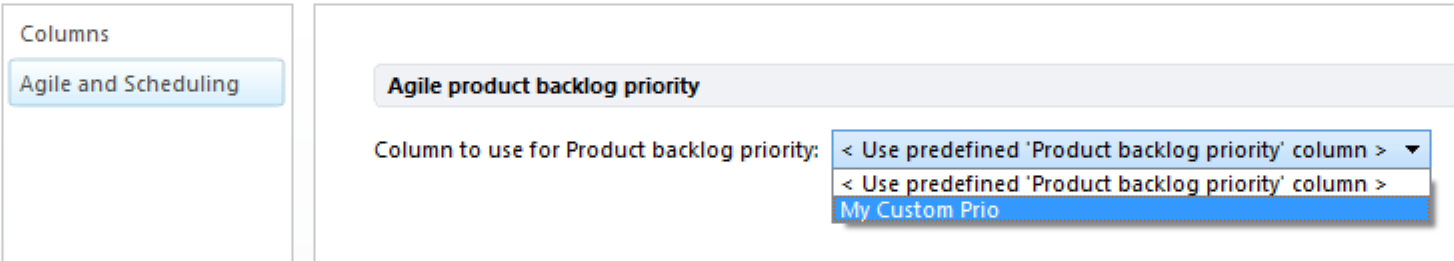
You have commands on the toolbar to hide/show past sprints:



The work priority in "Items prioritised" is reflected on the prioritisation for the sprint backlog items in the co-workers To do list. Co-workers can also change priority on their items from the To do list (optional):



You can select a custom drop list column as your Sprint priority by going in to 'Customise project' and then 'Priority'. Here you have the option to turn off that team member can prioritise from their To do list:



Committing items from the main backlog to a sprint

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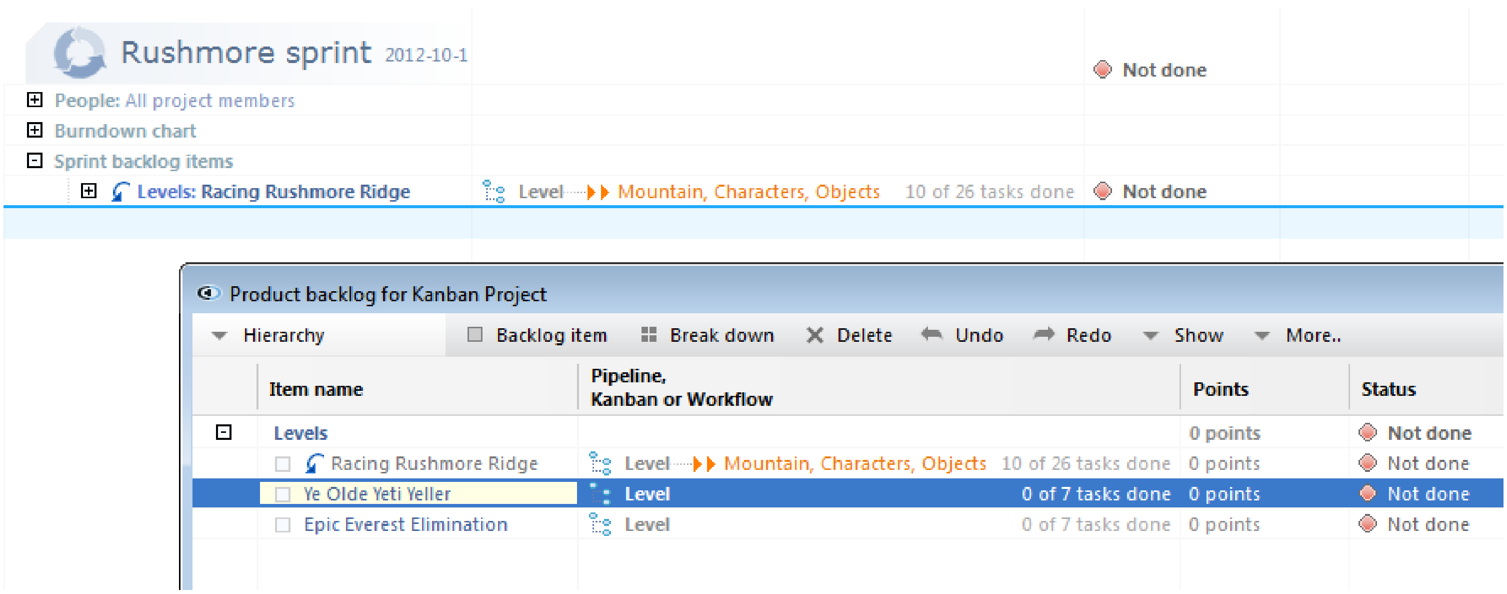
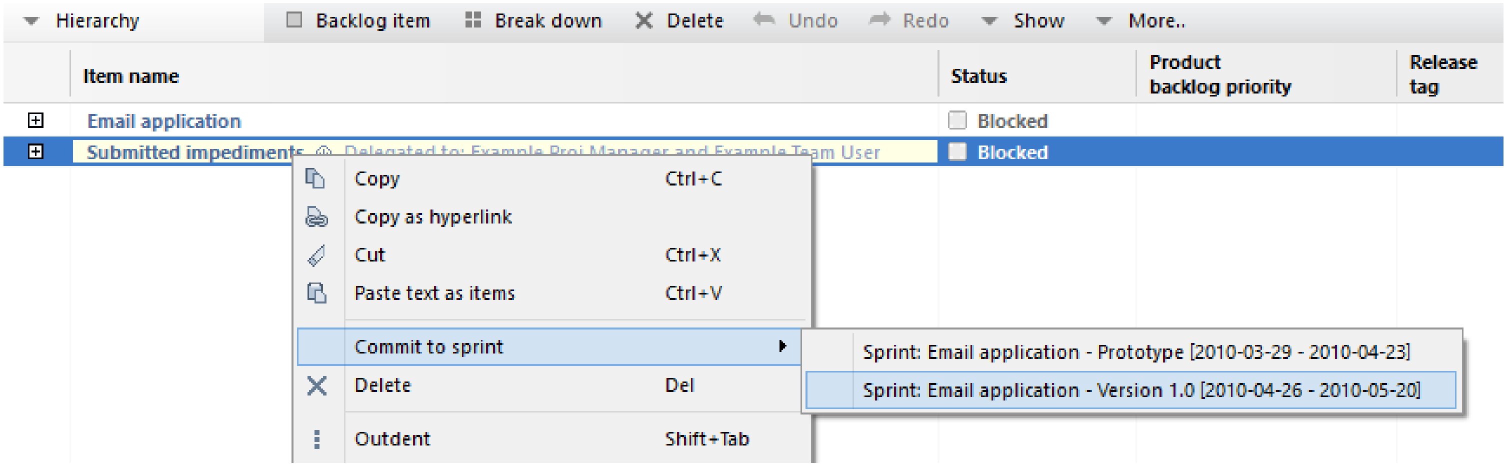
One of the cornerstones of the agile workflow in Hansoft is the ability to commit items from the [product backlog](#) to a sprint. In this way you are able to maintain the hierarchy and structure of the backlog (often used by top project managers and producers) while working with individual sprints with their unique hierarchies and structures.

Items can be dragged from the Product backlog window directly into the sprint, indicated by the blue line in the sprint backlog.



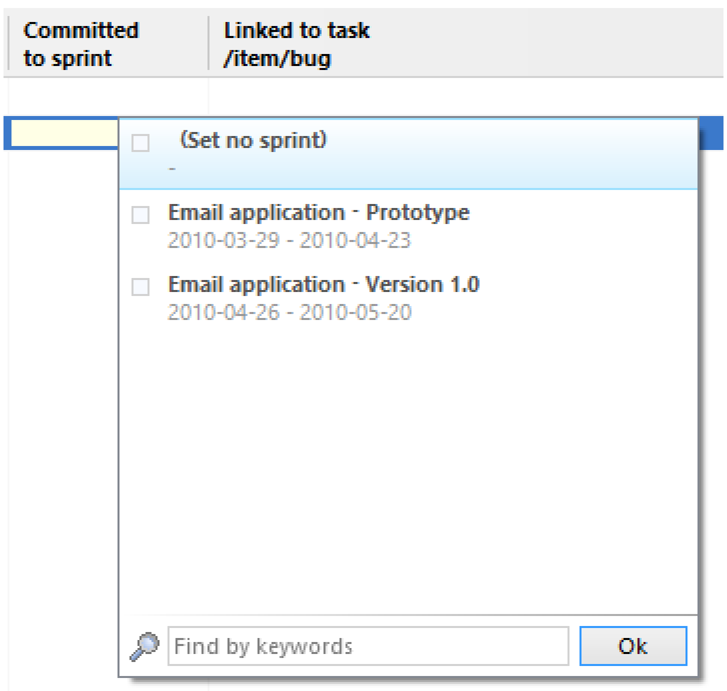
Committing items from the backlog to the sprint using the board view

Items can also be commited using the context menu.



Committing an item to a sprint using the context menu

Furthermore, the pre-created column Committed to sprint can be enabled, and used to quickly assign items to sprints.



The Committed to sprint column

Managing users in agile projects

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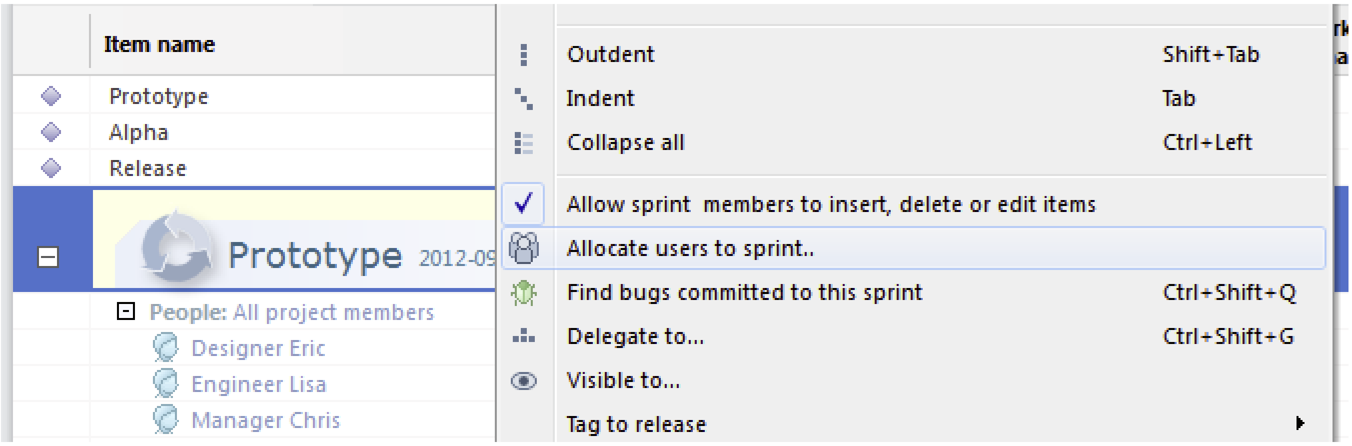
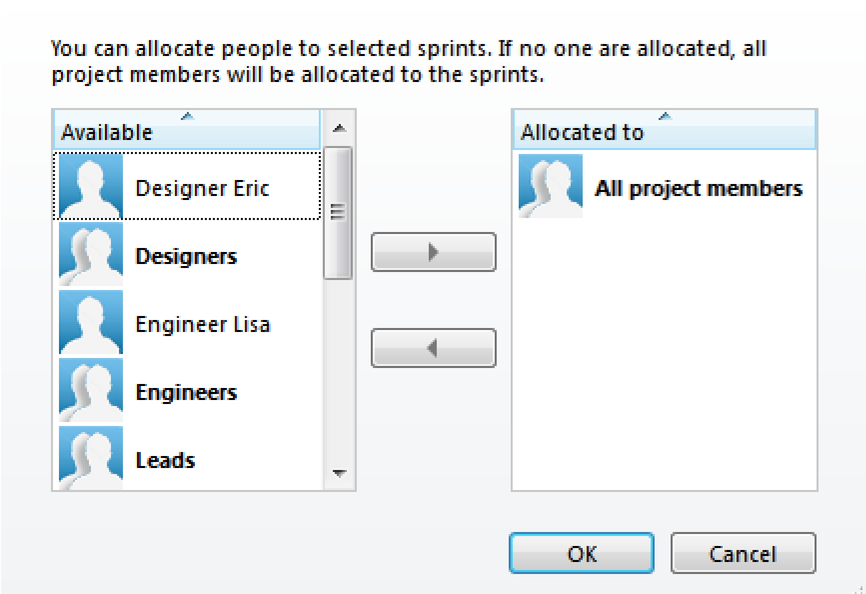
It is generally advised to allocate a specific set of users or user groups to a sprint. This can be important when you have separate parallel programming and art sprints.

Accessing the user allocation dialog



Right-clicking on a sprint

Right click on the sprint, and select Allocate users to this sprint in the context menu. You can also right click on a single user in the People list, and select Allocate users to sprint.

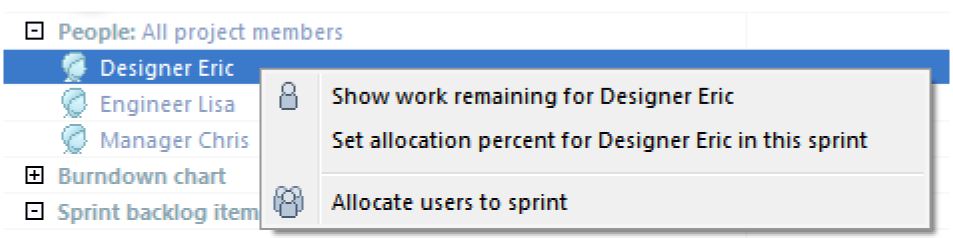


The user allocation dialog

Allocating users to sprints also enables use of the work remaining column. When users update the estimated work

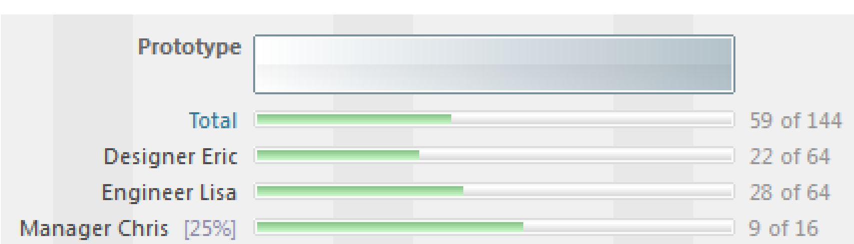
remaining, the user allocation meters on the timeline part of the schedule is also updated to reflect the total work remaining for each user. Additionally, the portfolio section of Hansoft accurately reflects the user allocation across the entire portfolio.

The user allocation section in the schedule timeline



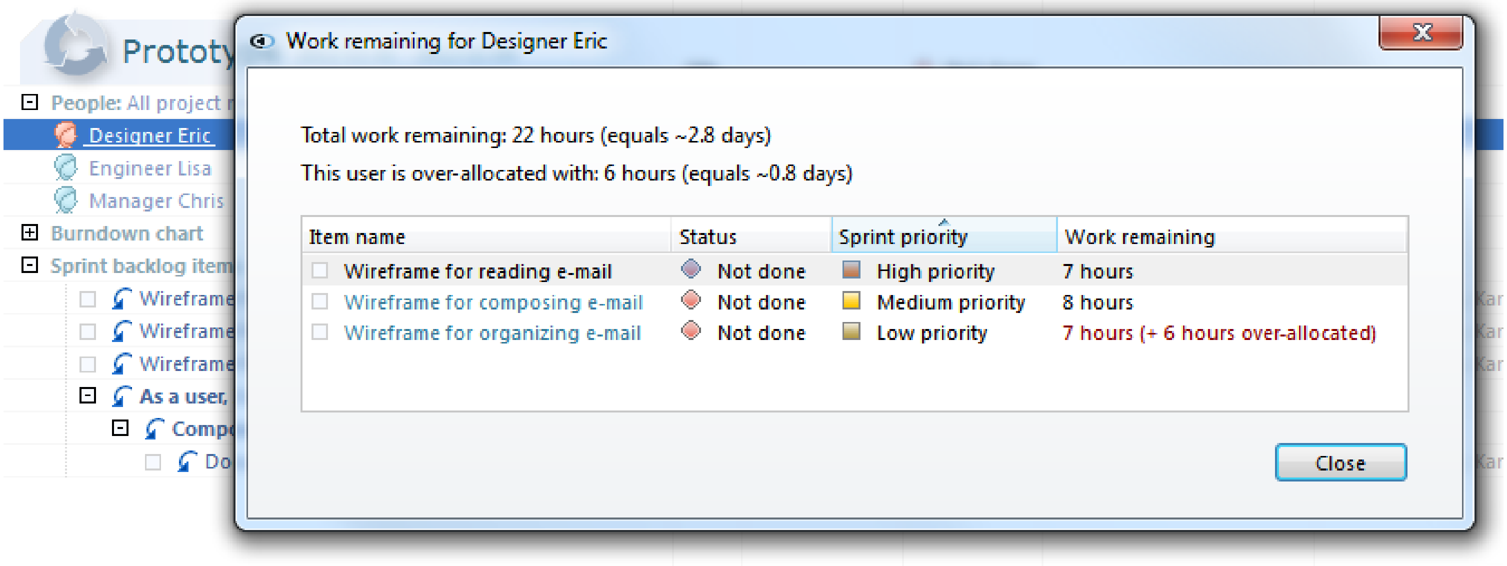
Setting allocations by right-clicking a user

Users can be allocated by a percentage, to accommodate the fact that users can work on several sprints in parallel, or that users might have responsibilities outside of the sprint work.



A part-time allocation to a sprint

Clicking a user in the People section will display a summary of tasks for that user in the sprint. Tasks that are the allocated time will be displayed in red.



Sprint burndown charts

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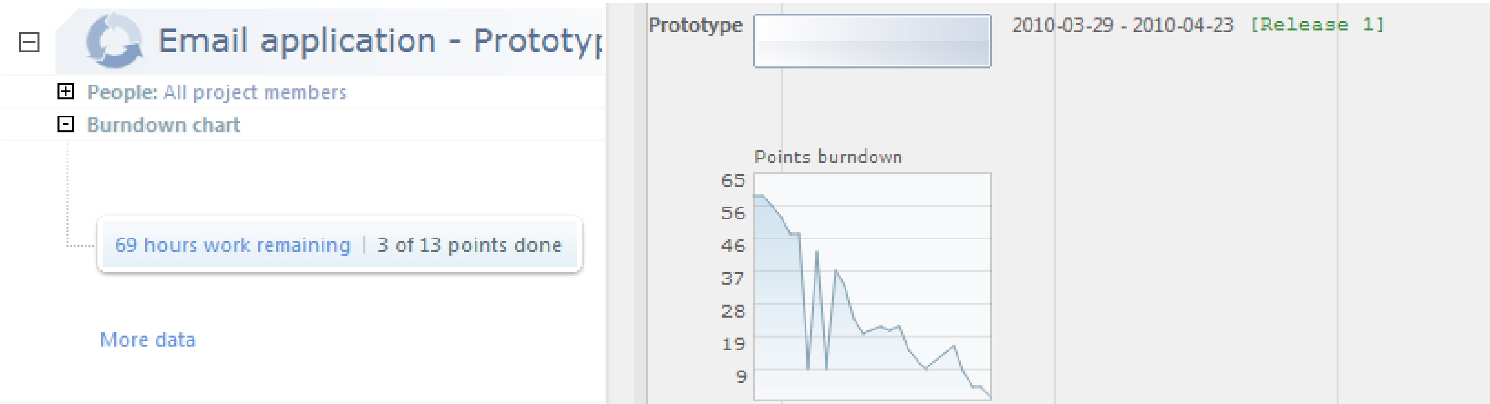
Burndown charts also play a central part in agile projects. As the total work remaining, ideal days or points changes day to day within a sprint, it forms a burndown chart, the shape of which is denoted as a signature. This chart and signature can tell us a lot about the rate at which the teams and their corresponding individuals or groups are working and also when they are likely to be finished.

The burndown chart

Depending on if you use points and or ideal days, different boards will be visible (like 'Points' below) in the burndown chart in the list view. Click each board to switch the burndown chart in the timeline view between work remaining, ideal days or points.

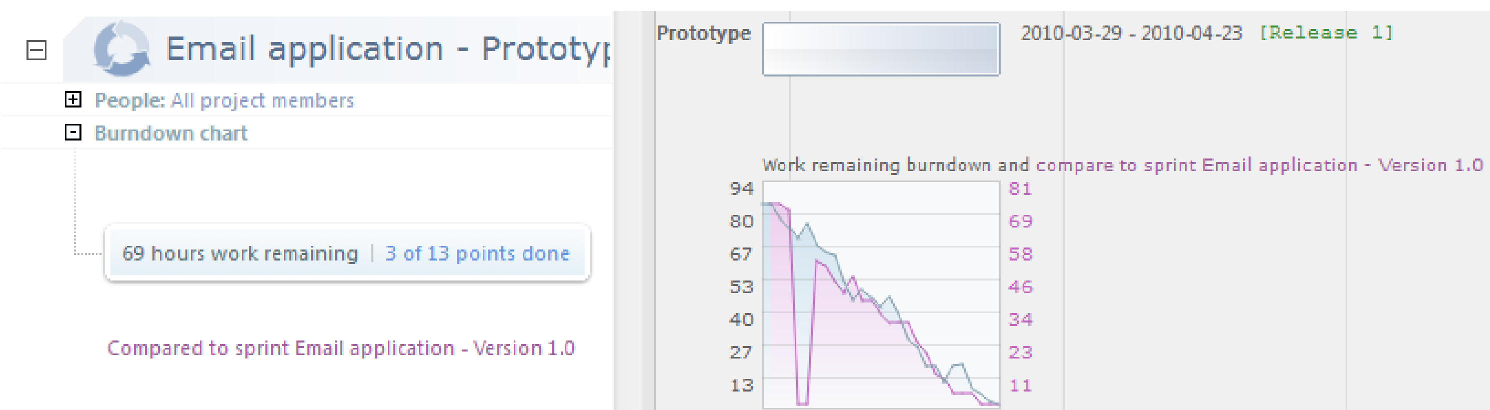


Drawing more data in the chart

You can select the following options to draw more data in chart after you have selected work remaining, ideal days or points as your main chart:

- Also draw ideal days or points
- Work created, changed or deleted
- Work remaining and predictions for individual users (such as "John Smith")
- Work remaining for user groups (such as "Programmers")
- Work remaining on selected items (such as all "design" tasks)

In the screenshot below there is an example of comparing a past sprint to the ongoing one:



Release burndown chart

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Release burndown charts also play a central part in agile projects. The signature shows the overall progress for a project or a delivery.

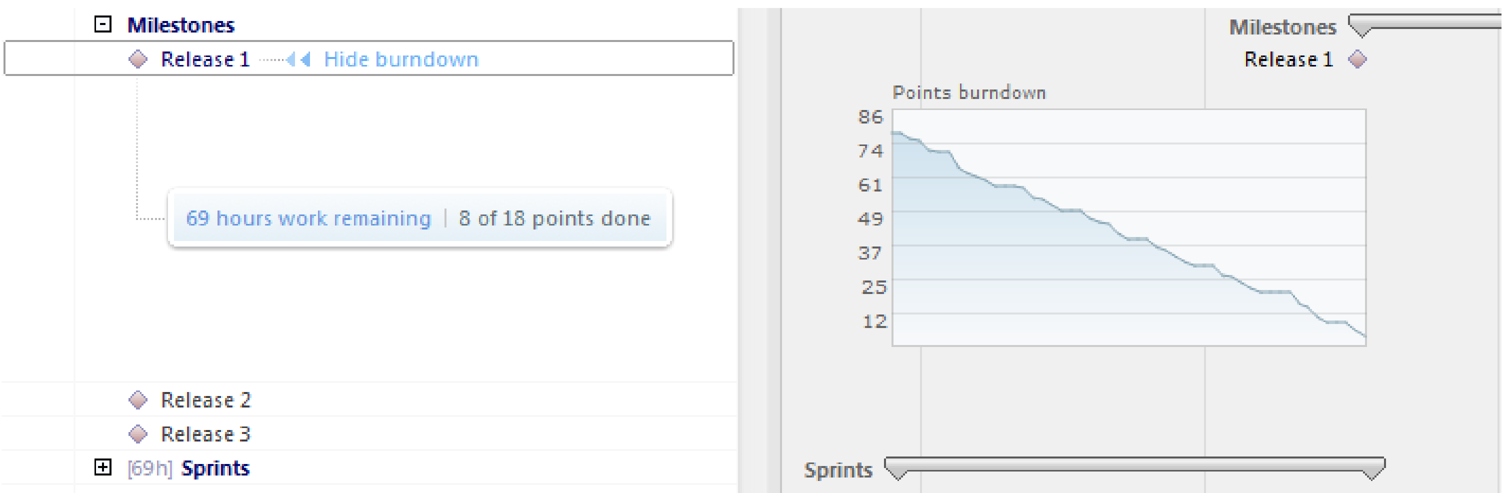
Showing the release burndown chart

In order to show burndown charts on milestones / releases you must assign a sprint / iteration to the milestone. The sprint must start before the milestone is due.

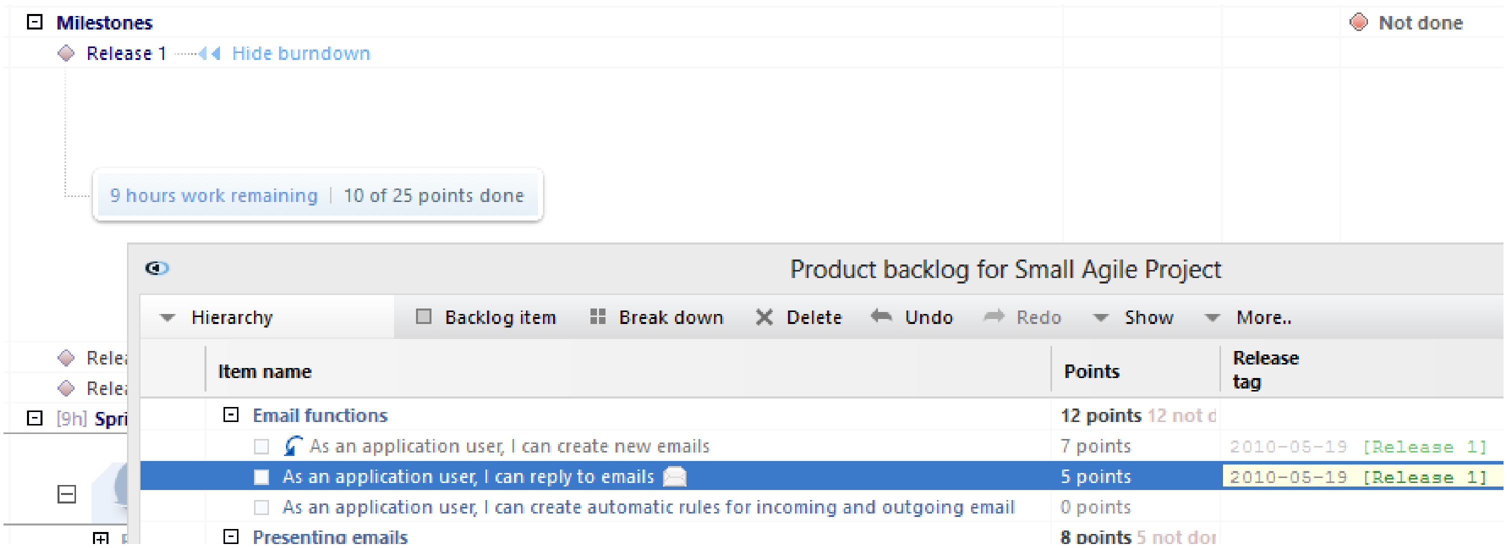
The start date of the burndown is when the first of all assigned sprints start and the end of the burndown is when the milestone is due.

The burndown chart

Depending on if you use points and or ideal days, different boards will be visible (like 'Points' below) in the burndown chart in the list view. Click each board to switch the burndown chart in the timeline view between work remaining, ideal days or points.



Items in the backlog that are not committed to a sprint but assigned to a milestone are also included in the burndown numbers



Involving team members

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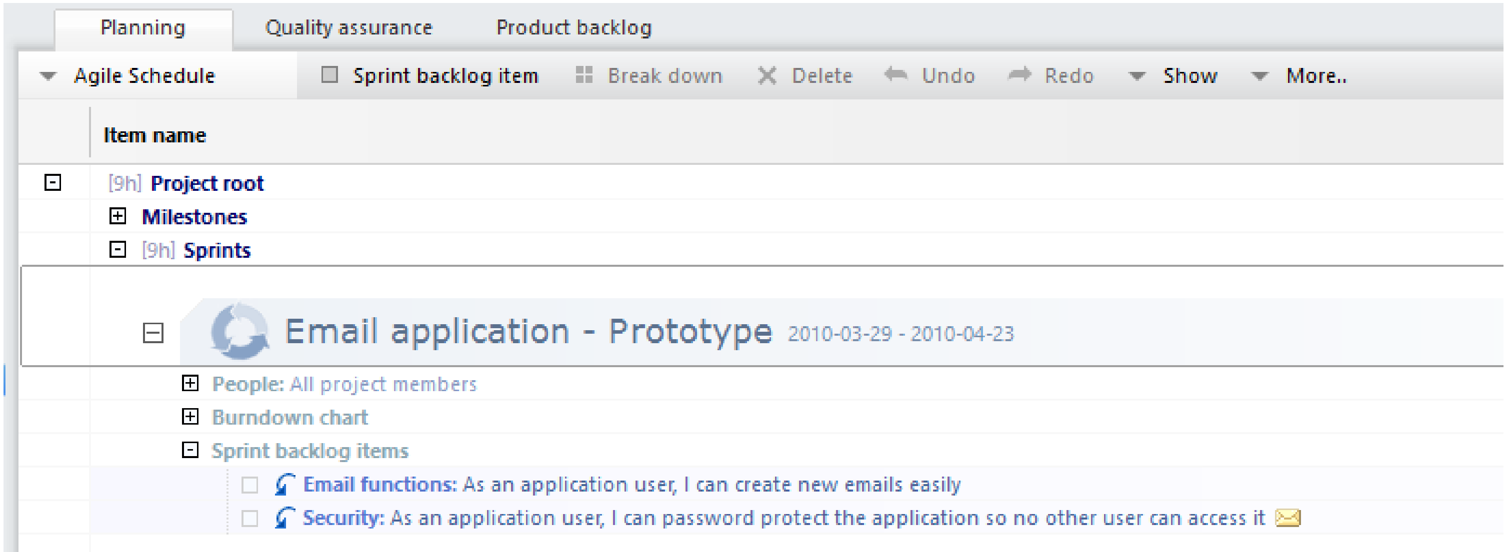
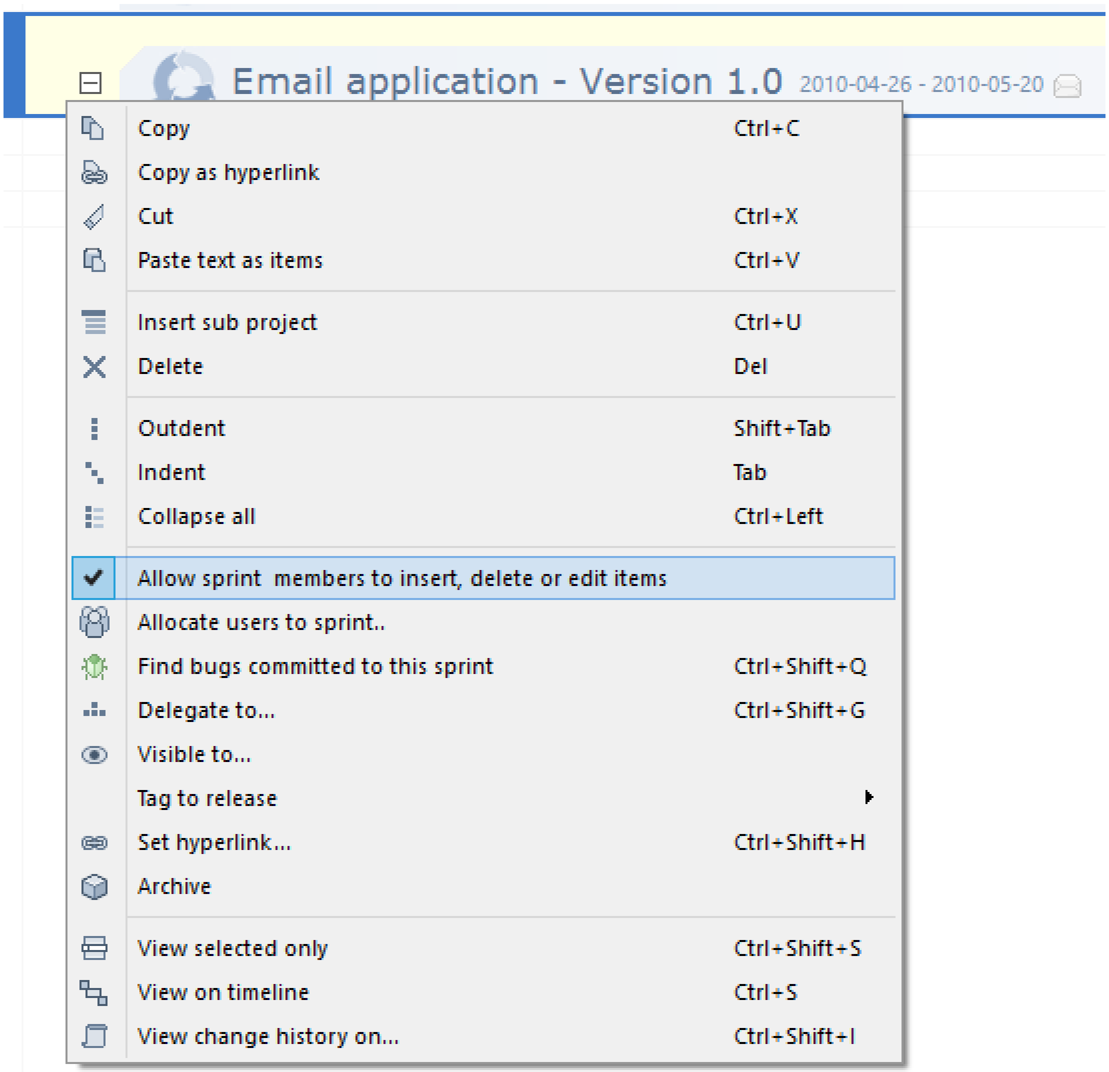
Involving team members is an important aspect in agile projects. Hansoft provides unique functionality to allow team members who are not project managers to insert, delete and edit sprint backlog items. In addition to this, Hansoft also provides functionality to break down backlog items into tasks and prioritise them.

The default setting in Hansoft is that members of a sprint can create, delete and change sprint backlog items. They cannot, however, change any property of the sprint, such as who is a member of the sprint or when it starts or ends. Only a "Main project manager" or someone with delegated authority can change the property of the sprint.

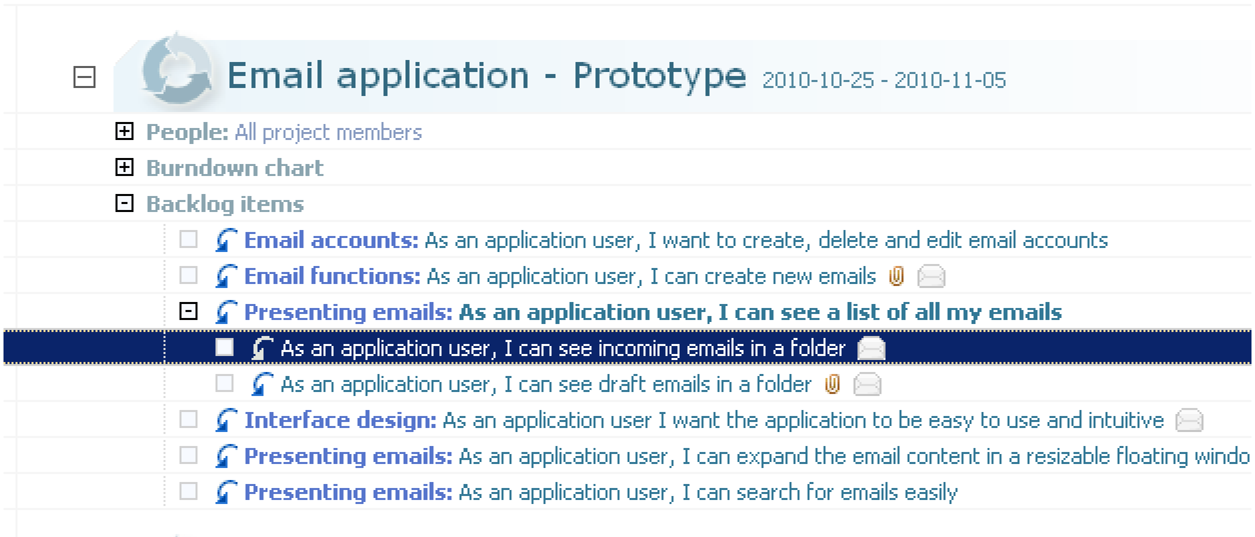
This is how it looks from the perspective of a team member; the blue areas indicate that he/she can insert, delete and edit sprint backlog items here.



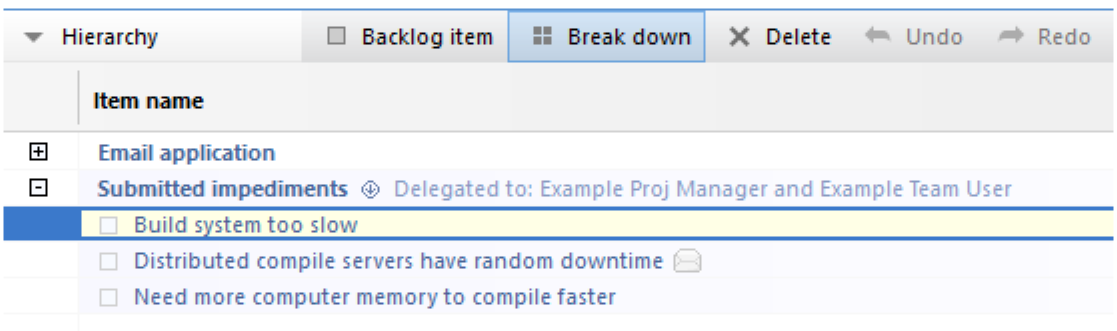
If you are a main project manager or someone with delegated rights, you can right click and remove the flag "Allow sprint members to insert, delete or change items":



From the perspective of a team member the result will now be that he/she cannot do anything (because the flag "Allow sprint members to insert, delete or change items" is now unchecked):



A team member can break down backlog items / iteration stories or continue to insert tasks directly from the To do list or in the Project view:



User stories

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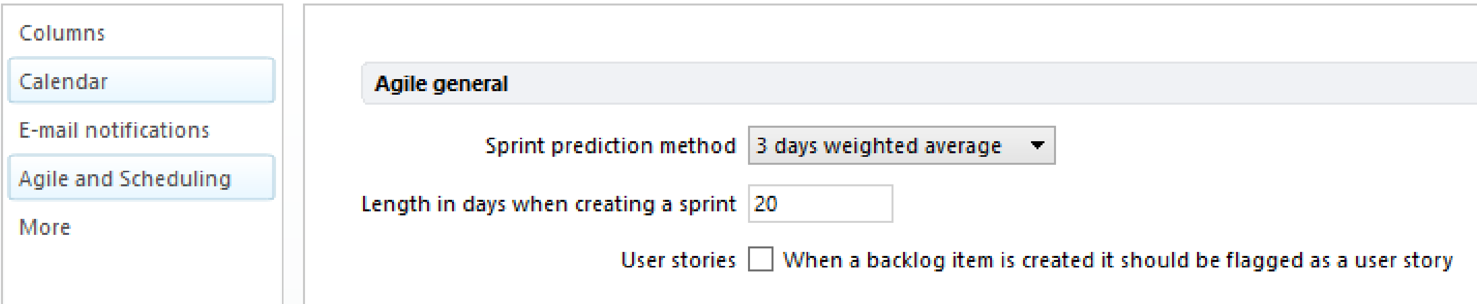
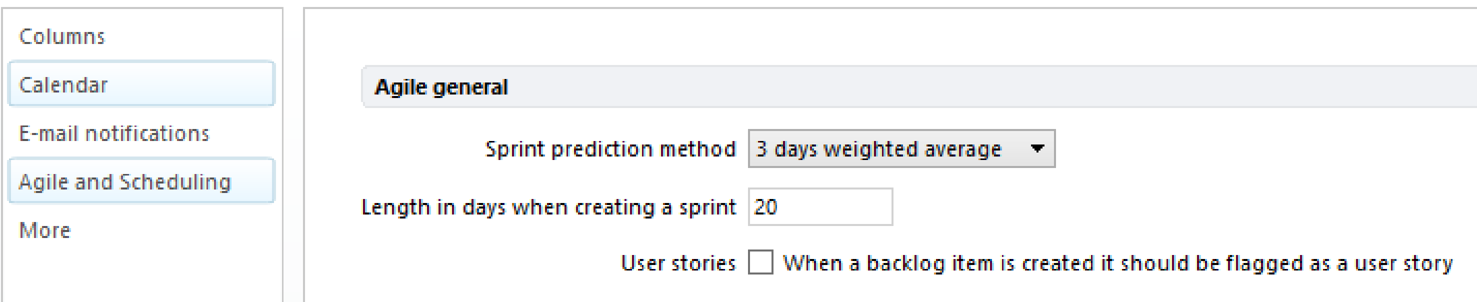
Hansoft has extensive functionality to create, edit, view and print user stories. User stories (in agile methodology) are high level feature descriptions formulated as one or two sentences in the everyday language of the user.

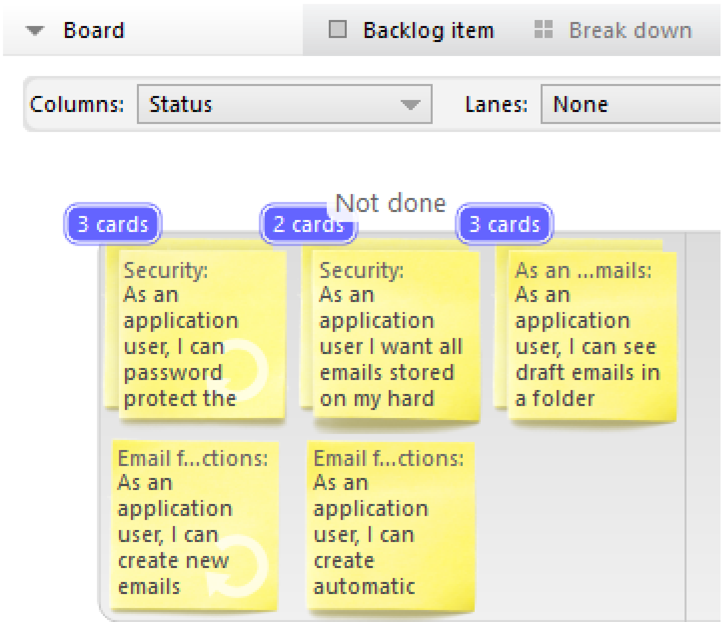
You flag backlog items (both in a sprint and in the backlog) by right clicking and selecting Flag as user story :



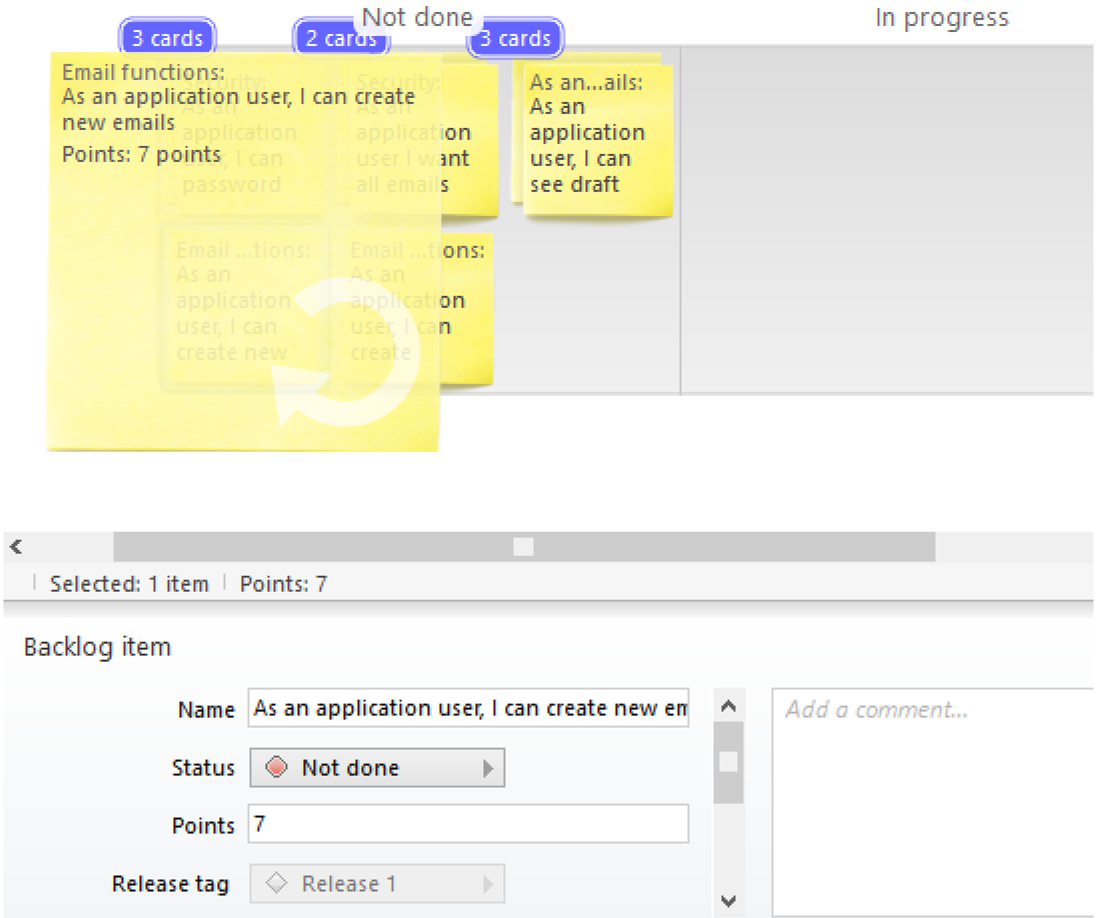
In customise project you have the option to have backlog items (both in the sprint and the backlog) flagged as user stories by default:



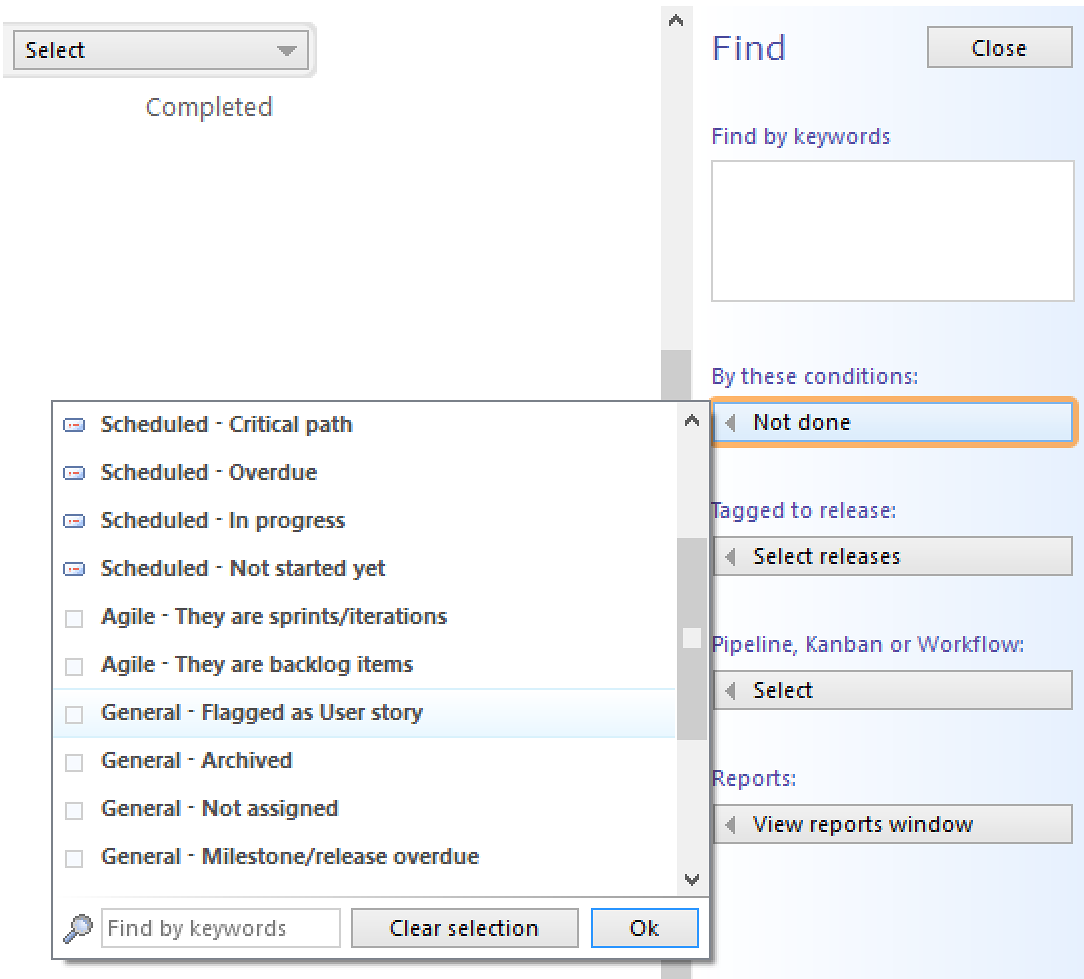
If you open the backlog (Ctrl + B) and select "Items on a wall" you can work with user stories on a virtual wall:
(Cmd + B) and select "Items on a wall" you can work with user stories on a virtual wall:)



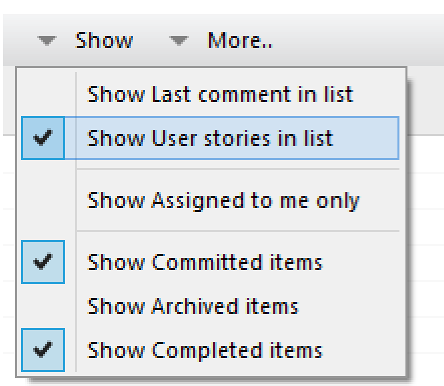
You now have a User story area to write in, in the activity details window at the bottom:



You can find all user stories by opening [Find]() and selecting General - Flagged as User Stories :

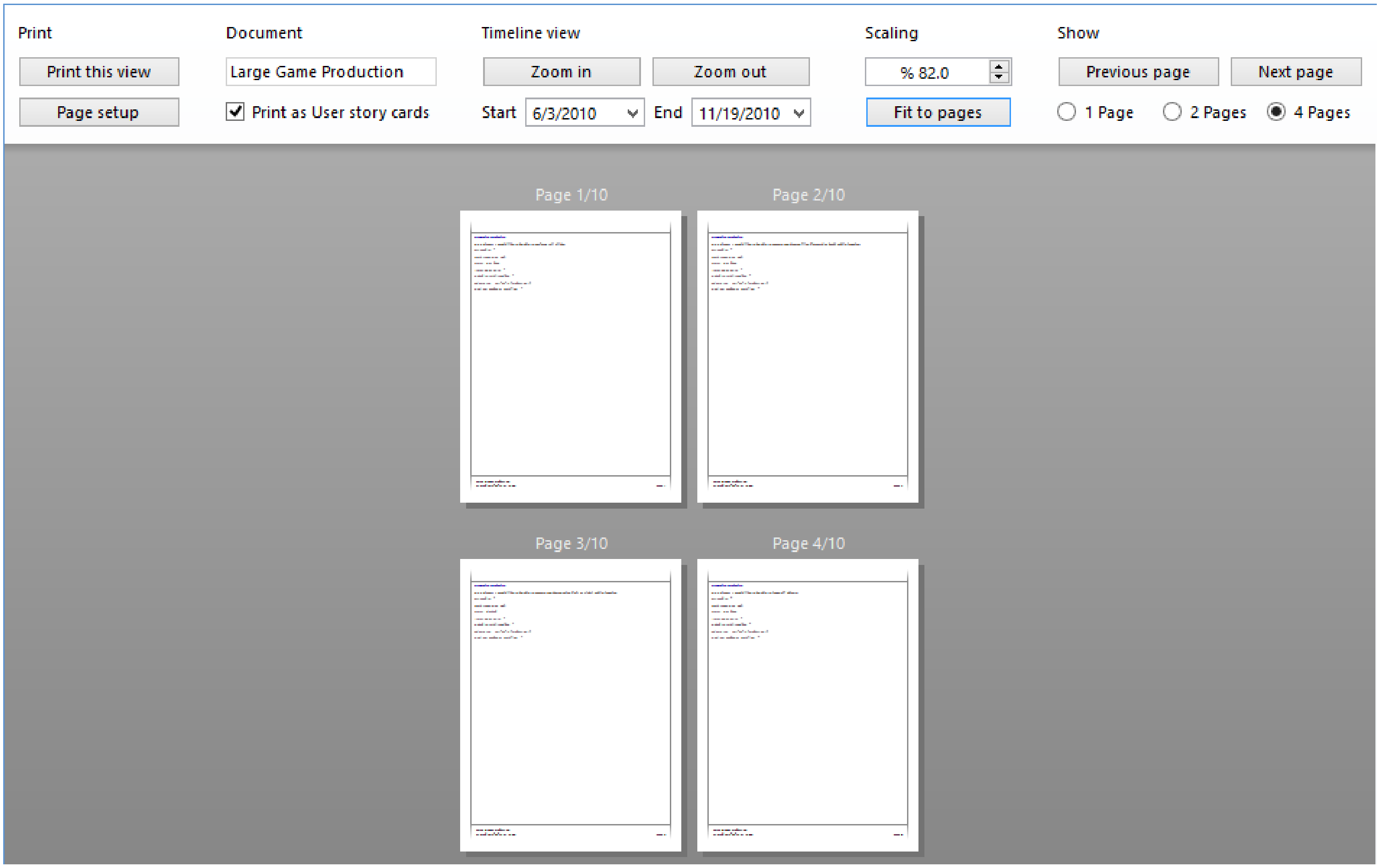


If you go to "Show" on the main toolbar you can choose to show User stories directly in the list:



If you first Find on all user stories and then open print and click this checkbox you can print user stories as cards .

Cards will look like this when printed. Data under the item name (like User and Work) is dependent upon which columns are visible (so if you show Estimated effort as a column it will be displayed on the card):



Product Backlog

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The backlog

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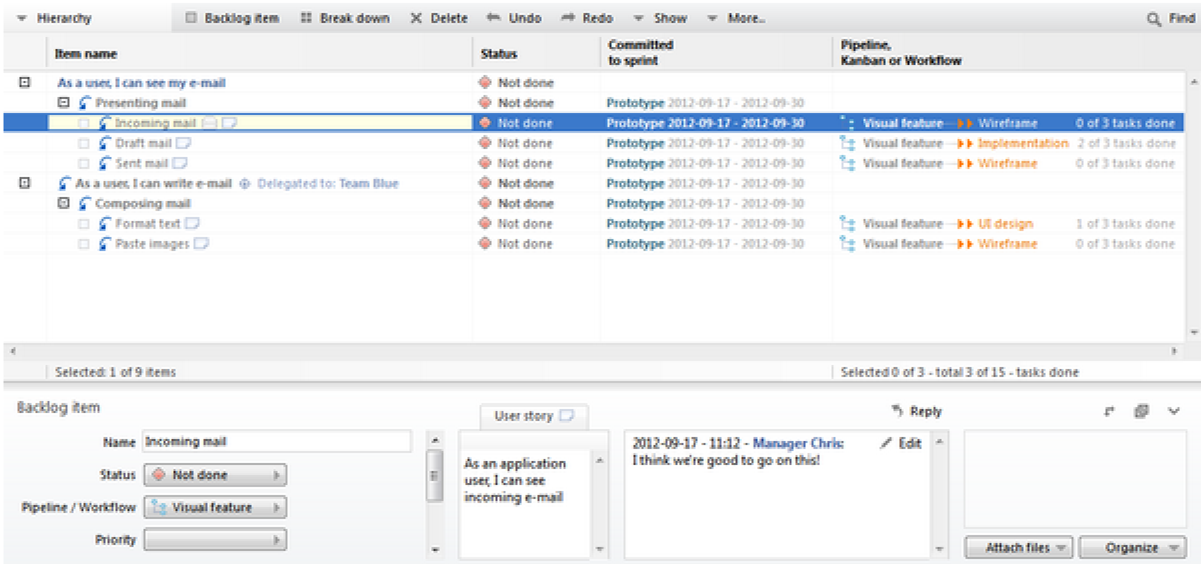

The product backlog of a small agile project

The backlog is the central repository for future work, and is considered an often vital part of an agile project. Items in the backlog can be anything that represents future work -- requirements, bugs, enhancements, feature requests or even scheduled tasks. The work in the backlog is not yet committed to a sprint, and is therefore not considered to currently be worked on. The act of dragging an item from the backlog to a sprint constitutes a commit, at which time it is assigned to a user. Items committed to a sprint have a Backlog icon before the item name, with the committed sprint shown in the "Committed to sprint" column.

There are three ways of working with items in the backlog: In a hierarchy, on a board or prioritised. Each of these views represents the same information and items.

Tip: The backlog can be configured to use custom columns that cover a large spectrum of agile needs. Please see the customise columns page for more information.

Backlog items in a hierarchy

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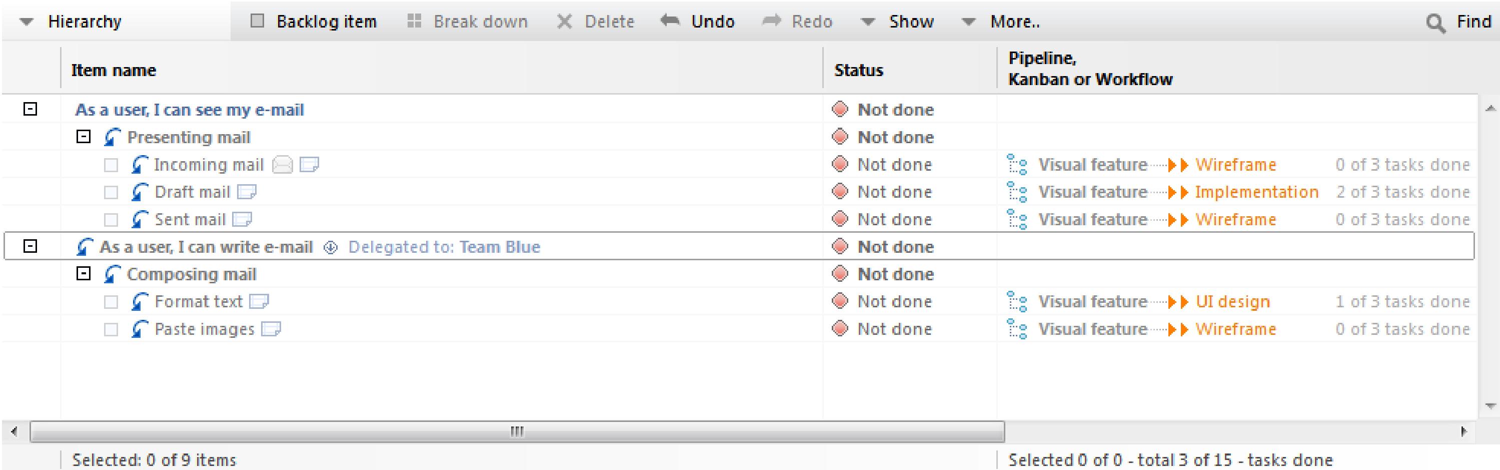
Items in the project backlog are commonly arranged in a hierarchy that reflects the overarching model of the project. This model is usually determined by how the team, and the product, is structured. Complementing this, parts of the backlog can be delegated to users or user groups. This is indicated by the "Delegated to" label next to a sub-project label.

Tip: In addition to the default columns, custom columns can be added that cover a large spectrum of agile needs. Please see the customise columns page for more information.



Backlog items on a wall

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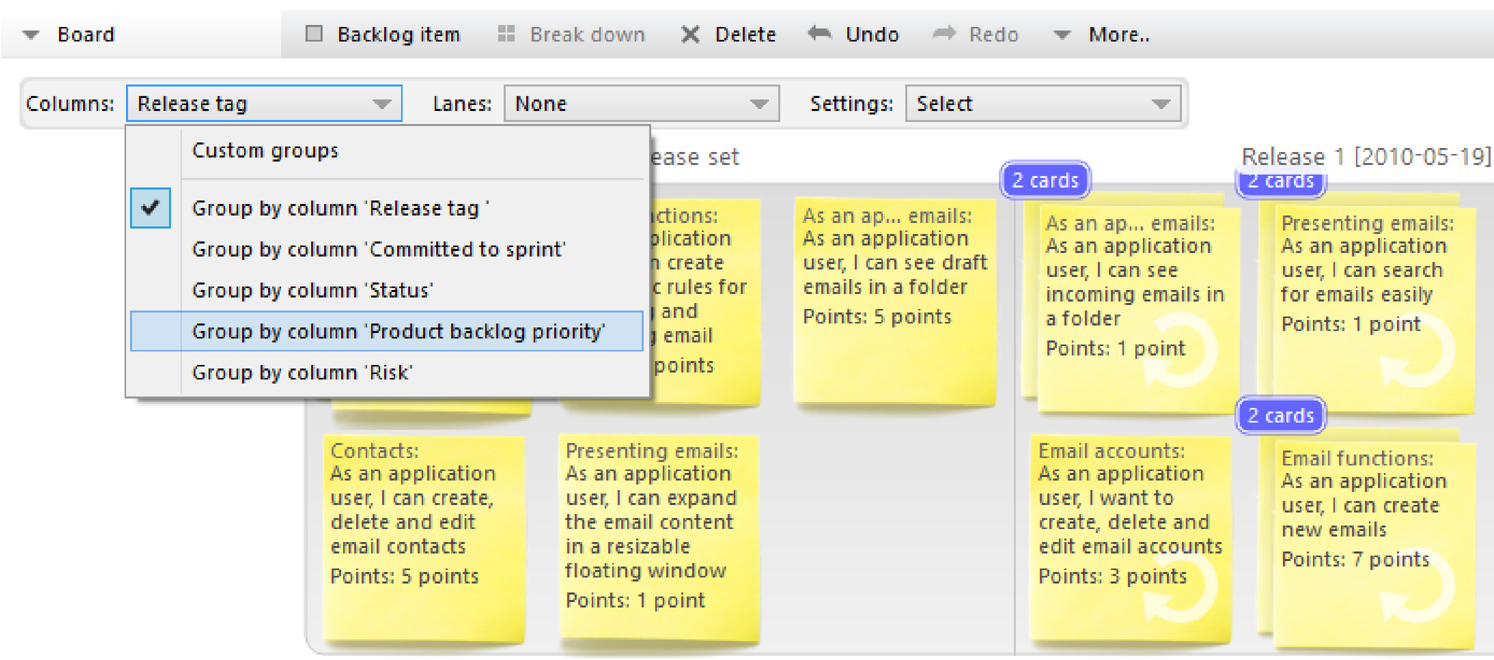
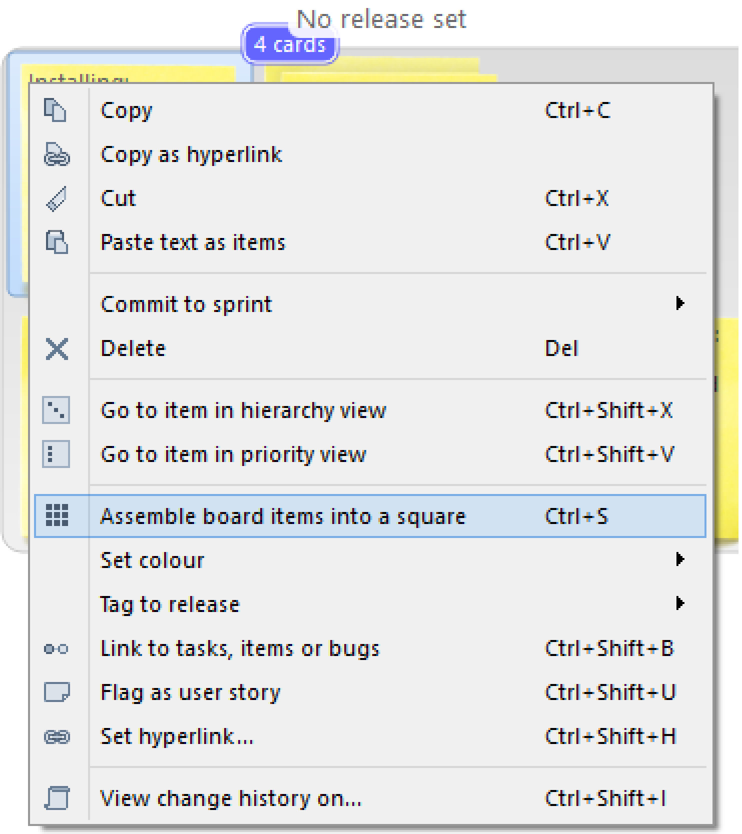
The main goal of this view is to analyse, create and work with items in alternative ways by arranging them on a virtual wall. This view is designed to simulate the large physical boards often used in agile projects.

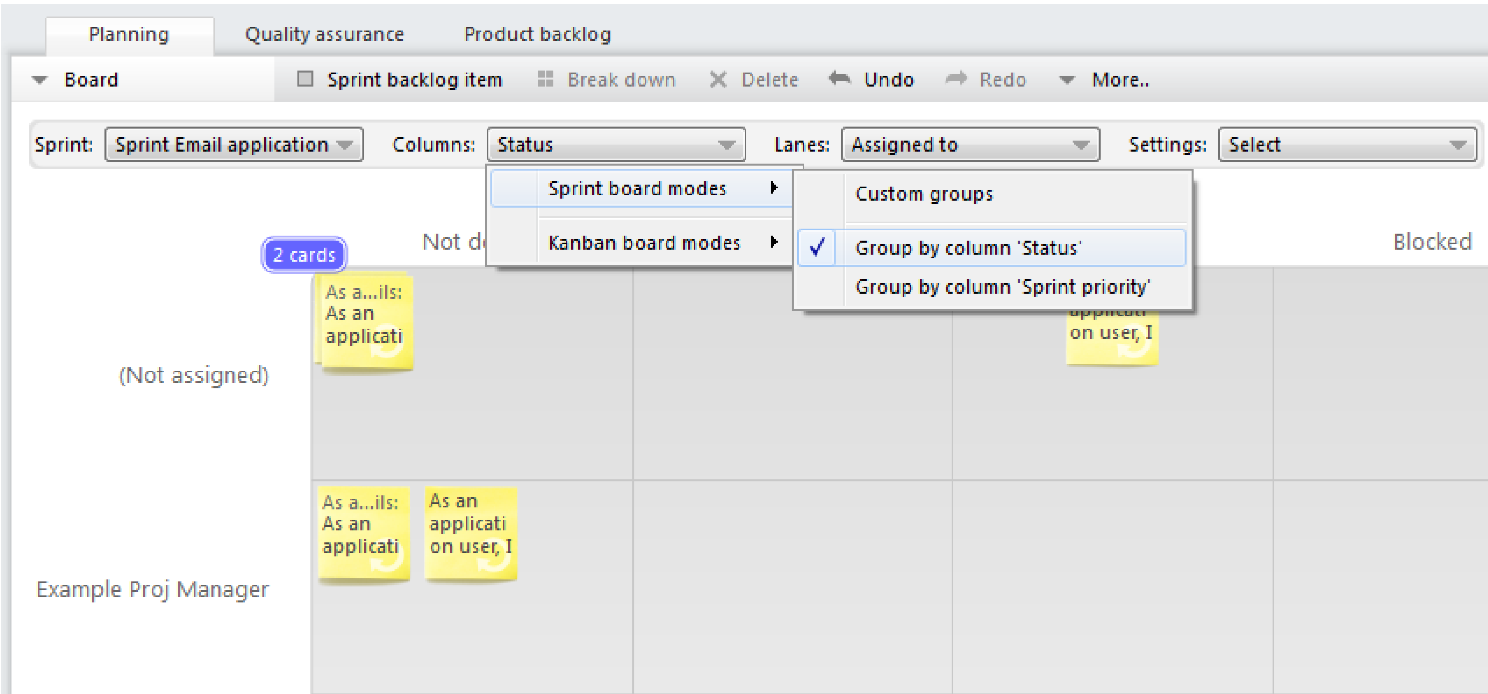
The wall can be set to different modes (based on either custom groups or columns) that represent the same information in a variety of different ways:



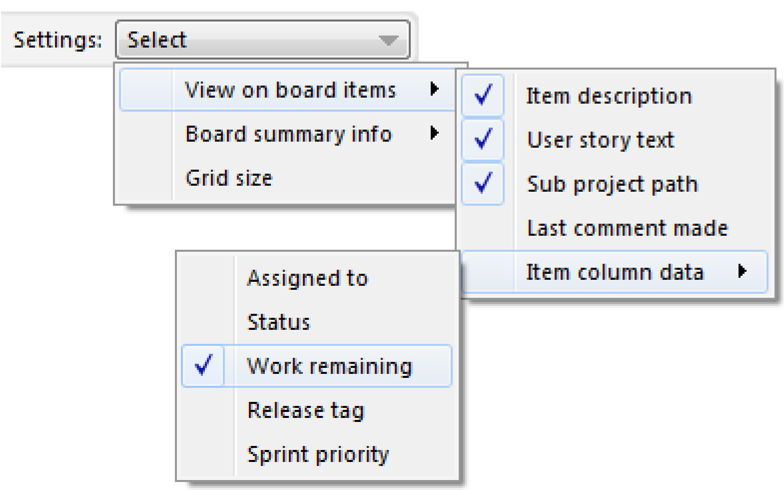
There are commands and keyboard shortcuts that are specific to the wall view and wall items:



Moving items in auto group mode will affect the items when dropping them into a new group:



There is a wide range of settings for the wall view (information shown on the board items, board summary, and the size of the grid):



Backlog items prioritised

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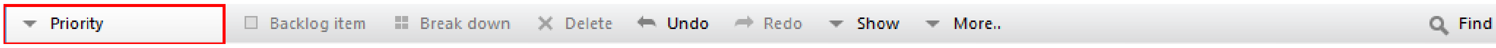
*Tip: switching between different view modes(priority/hierarchy etc) is done by clicking the tab next to **Backlog item***

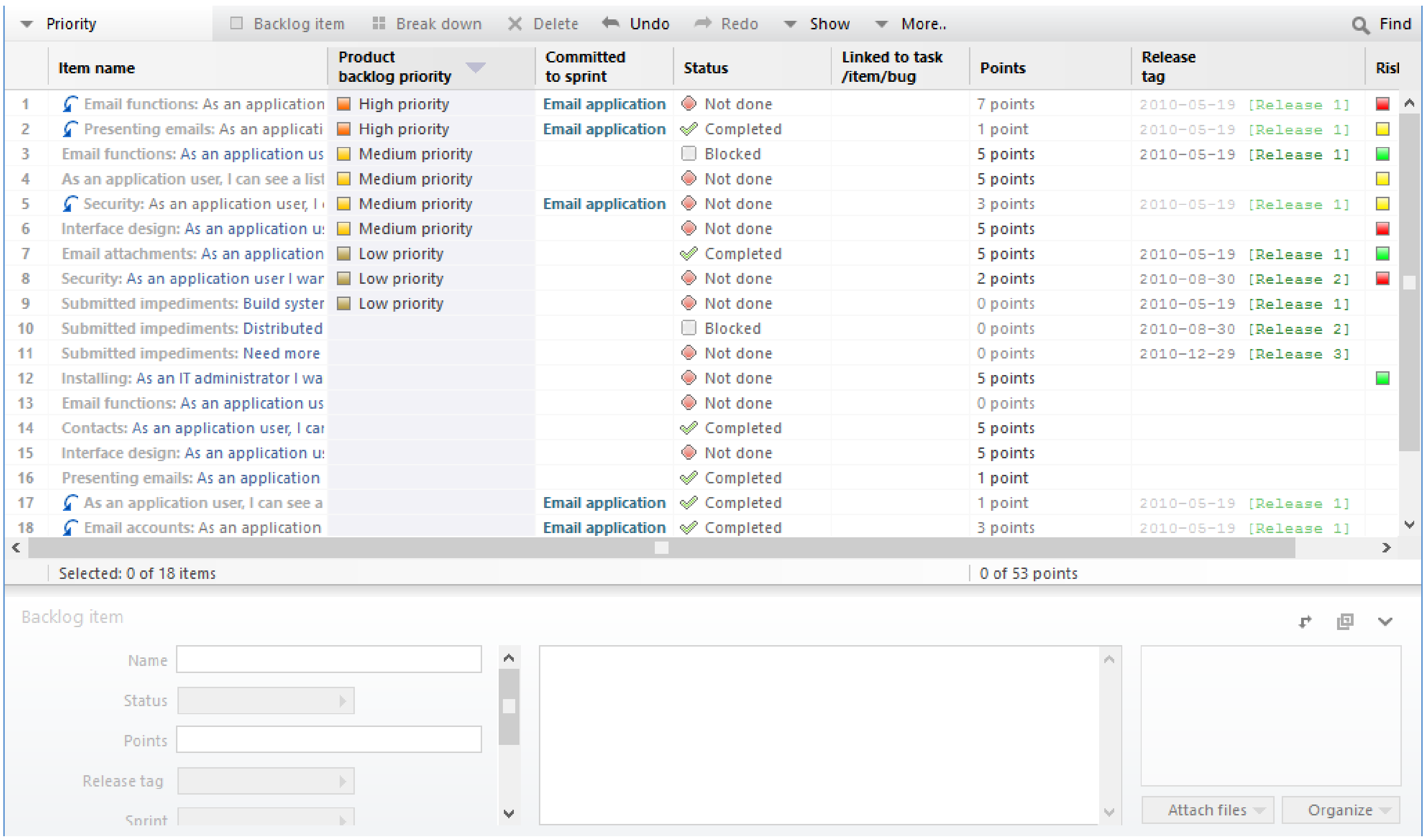
. *The tab title will always display the currently selected view mode.*

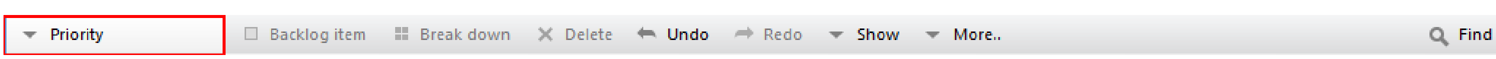


The main goal of this view is to prioritise items on a higher level for the project.

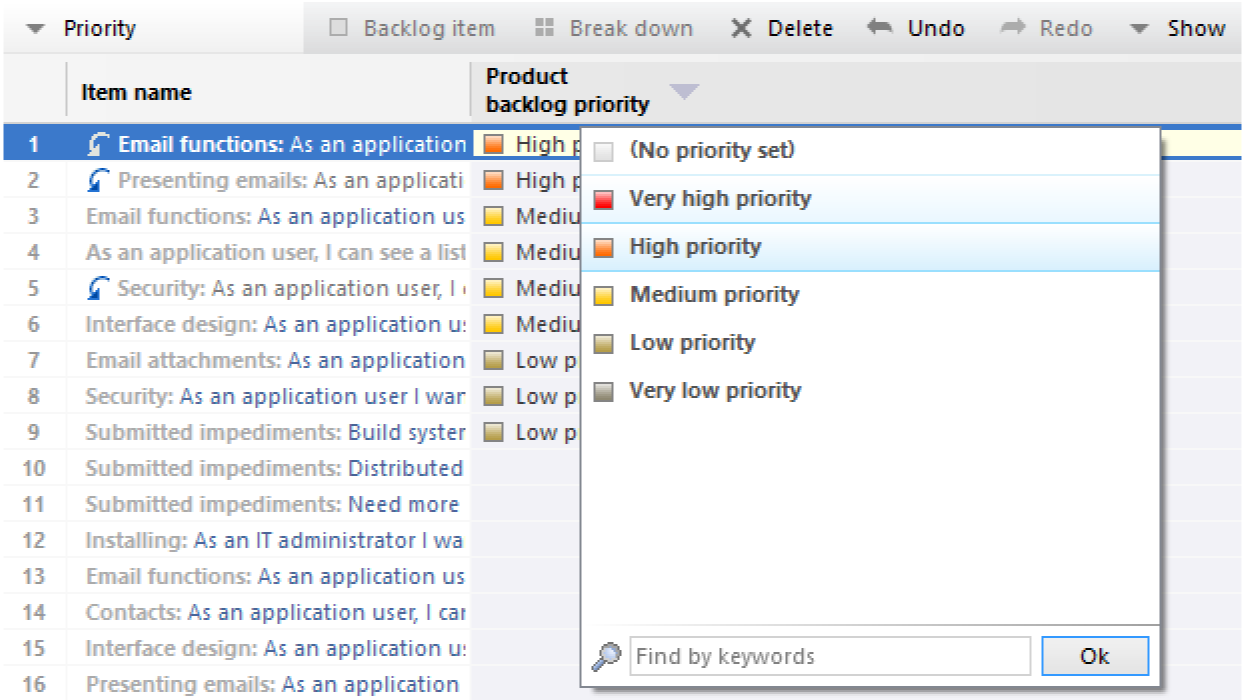
The normal workflow for a backlog item is to enter it (or commit it from the [product backlog](#)) into ["Items in a hierarchy"](#) and then prioritise it among all other items in "Items prioritised" (independent of the hierarchy).

You can set priority in 'Items prioritised' by either dragging items up or down, or by selecting from 'Product backlog priority' column:

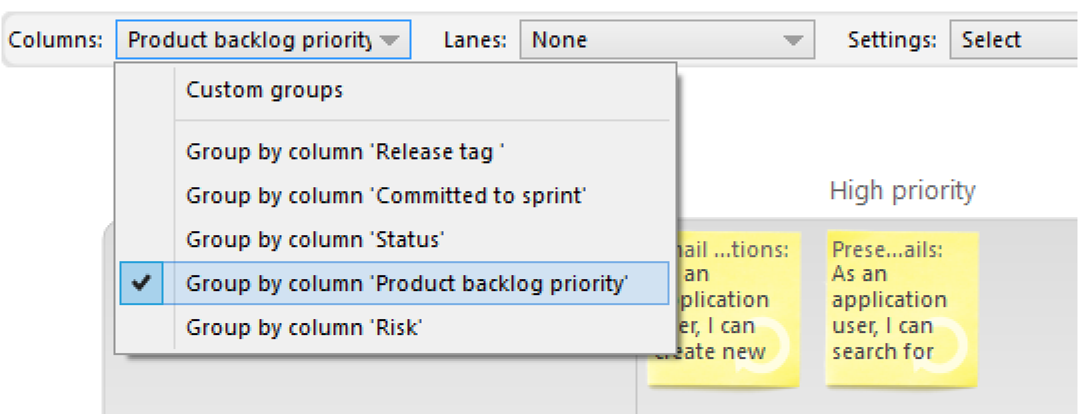




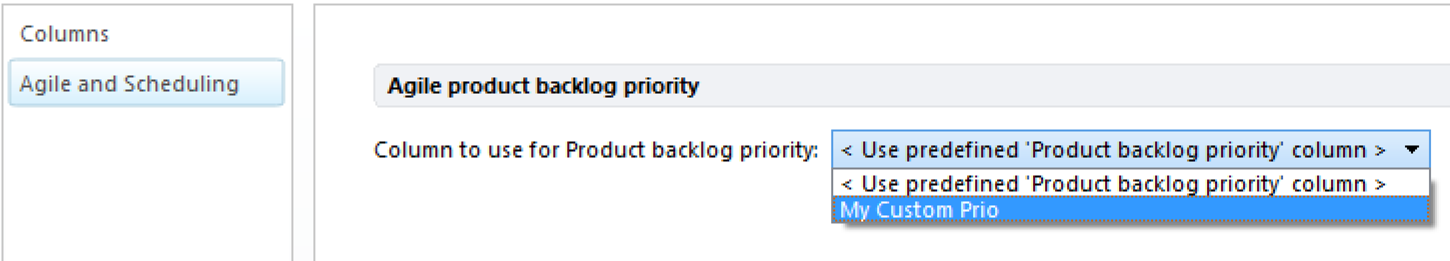
You can set the priority in 'Items in a hierarchy' by selecting from 'Product backlog priority' column:



You can set the priority in 'Items on a wall' by selecting 'Product backlog priority' as your wall mode:



You can select a custom drop list column as your Product backlog priority by going in to 'Customise project' and then 'Priority':



Prioritising a part of the backlog

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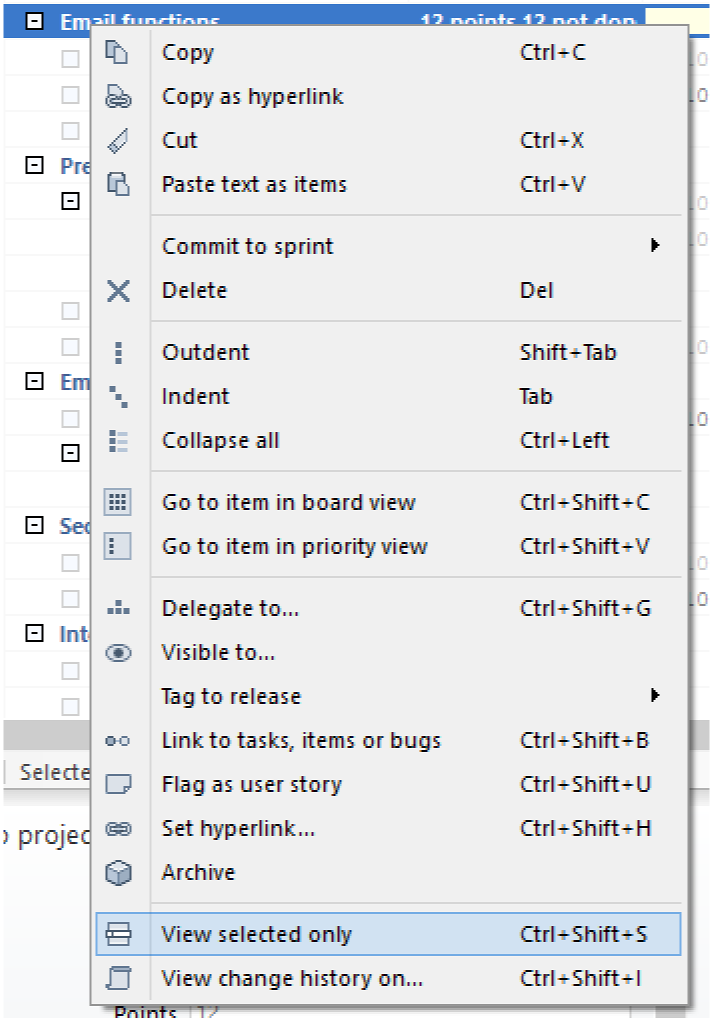
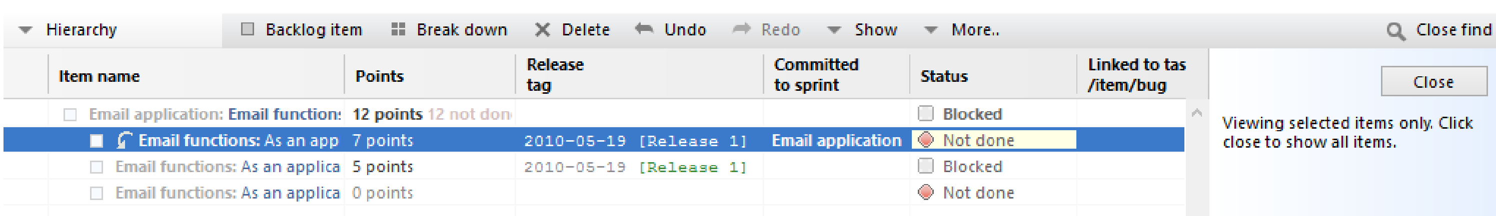
One important feature for doing true enterprise backlog management is to be able to prioritise a part of it (independent from other parts).

This is often the case when you have multiple product owners within the same large project.

Start with going to items in a hierarchy, select a sub project and select View selected only:



Now, go to Items prioritised and select priority from the column:



Backlog History

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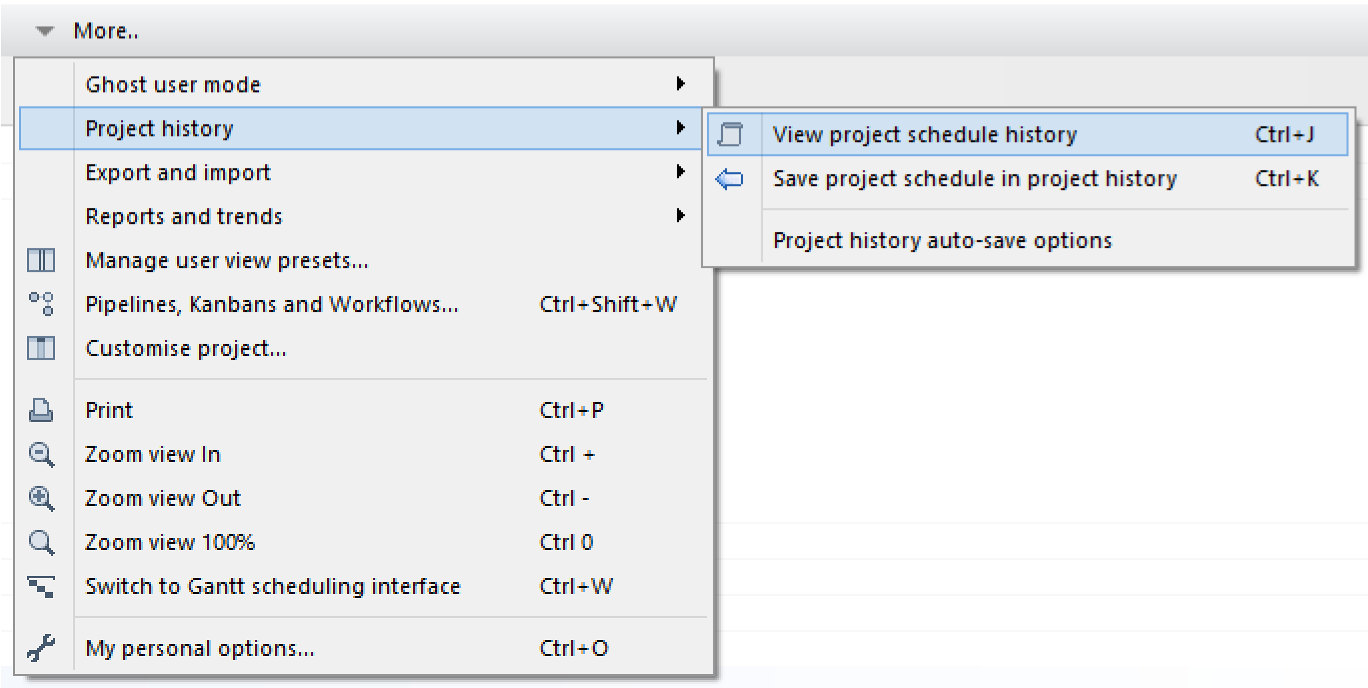
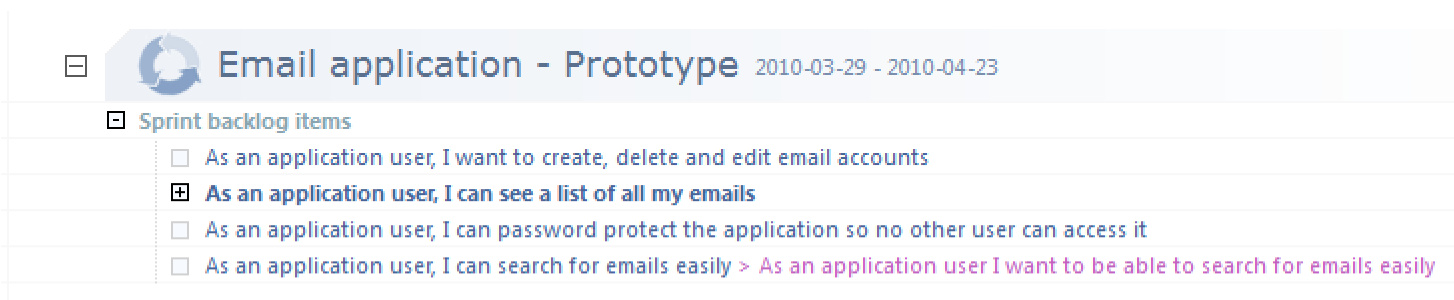
As with the main project view, you can also review the history for the product backlog. As an example, this can be

important when looking at which items have been added or deleted, or when comparing current requirements with those at the starting phase of the project.

You access the backlog history in the More menu and then View product backlog history. The keyboard shortcut is Ctrl + J, or Cmd + J.



If there is a difference between the historic version and the current, it is marked in violet, as seen below:



Task scheduling projects

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Getting started with scheduling

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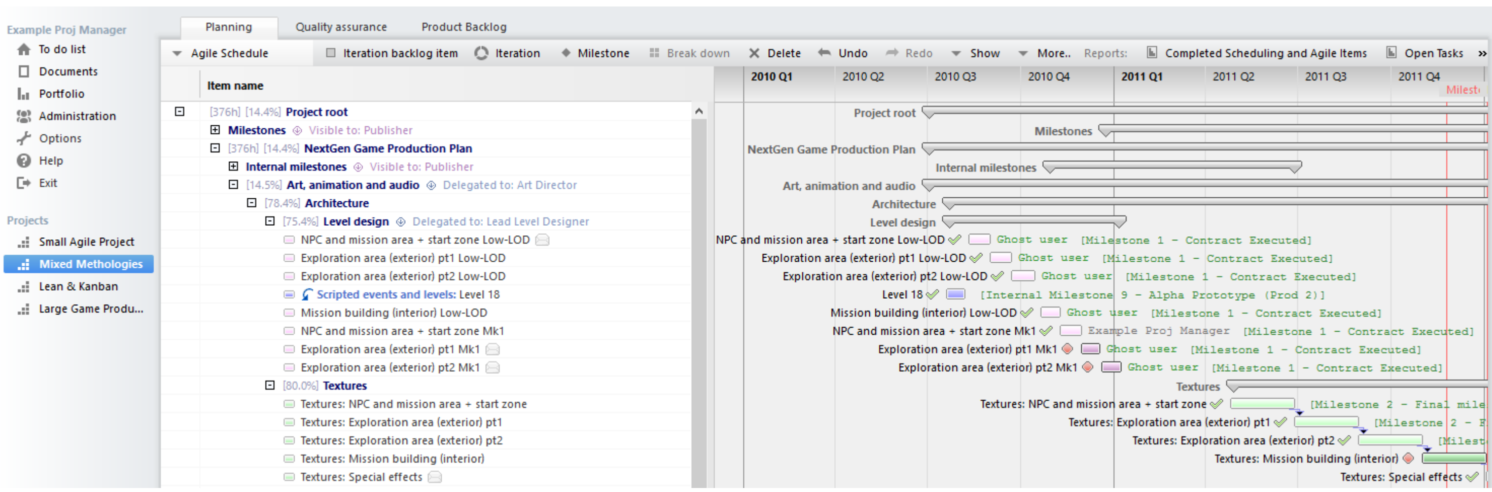
Each project has a timeline view where the activities (tasks and milestones) you create will be listed on the left and visualised on the right. Above the timeline view is the main main toolbar and beneath it is the Activities details window.

From Hansoft 5.3 and onwards you commit items from the product backlog to a schedule. This is very useful because features can be listed, categorized and analyzed in the product backlog and then planned out in the project view. Read more about [using the product backlog in scheduling projects here](#).

An example of a scheduled task in a project:



Tip: After you have read this page, start with [inserting tasks](#).

Three important things to have in mind when making the project plan:

- When you are making a project plan and assign tasks to users or change anything, it will have an immediate effect to all users connected to the project server.
- The project plan you create is controlled only by you, with your account, unless you unlock tasks to let assigned users change the project plan themselves. This is covered in the "Unlock tasks" section of this help manual.
- The project can have several project managers, each with his/her own project plan. If you want to co-ordinate between several project managers in the same project, Hansoft recommends the Portfolio allocations tool. This is covered in the Portfolio allocations section of this help manual.

Inserting and deleting activities

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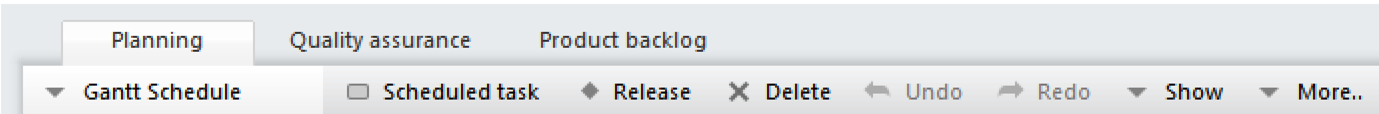
This section covers how to insert and delete activities. Activities are objects inserted in the timeline view such as tasks and milestones.



The toolbar for working in Scheduled mode

Tip: When you are finished inserting tasks and milestones, proceed to set the [name, start, finish and duration](#).

Inserting a task

Inserting a task is done by clicking the Scheduled task button on the main timeline toolbar, or by pressing Ctrl + N (Cmd + N). The task will be inserted after the currently selected item.

Inserting a release

You insert a release (also referred to as a milestone) by clicking the Release button on the toolbar, or by pressing Ctrl + M (Cmd + M). The milestone will be inserted after the currently selected item.

Deleting an item

Deleting items can be done either by clicking the Delete button, by pressing the Delete key, or by right-clicking the intended item and selectind Delete.

Setting basic activity properties

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Changing Task properties

The activity list allows for basic manipulation of task name, start and finish dates, duration and the users allocated to a task.

Note: The picture above shows a snapshot from an activity list when using the "Fixed duration" project method. The differences between the two project methods are covered in the "Fixed work and fixed duration" section of this manual.

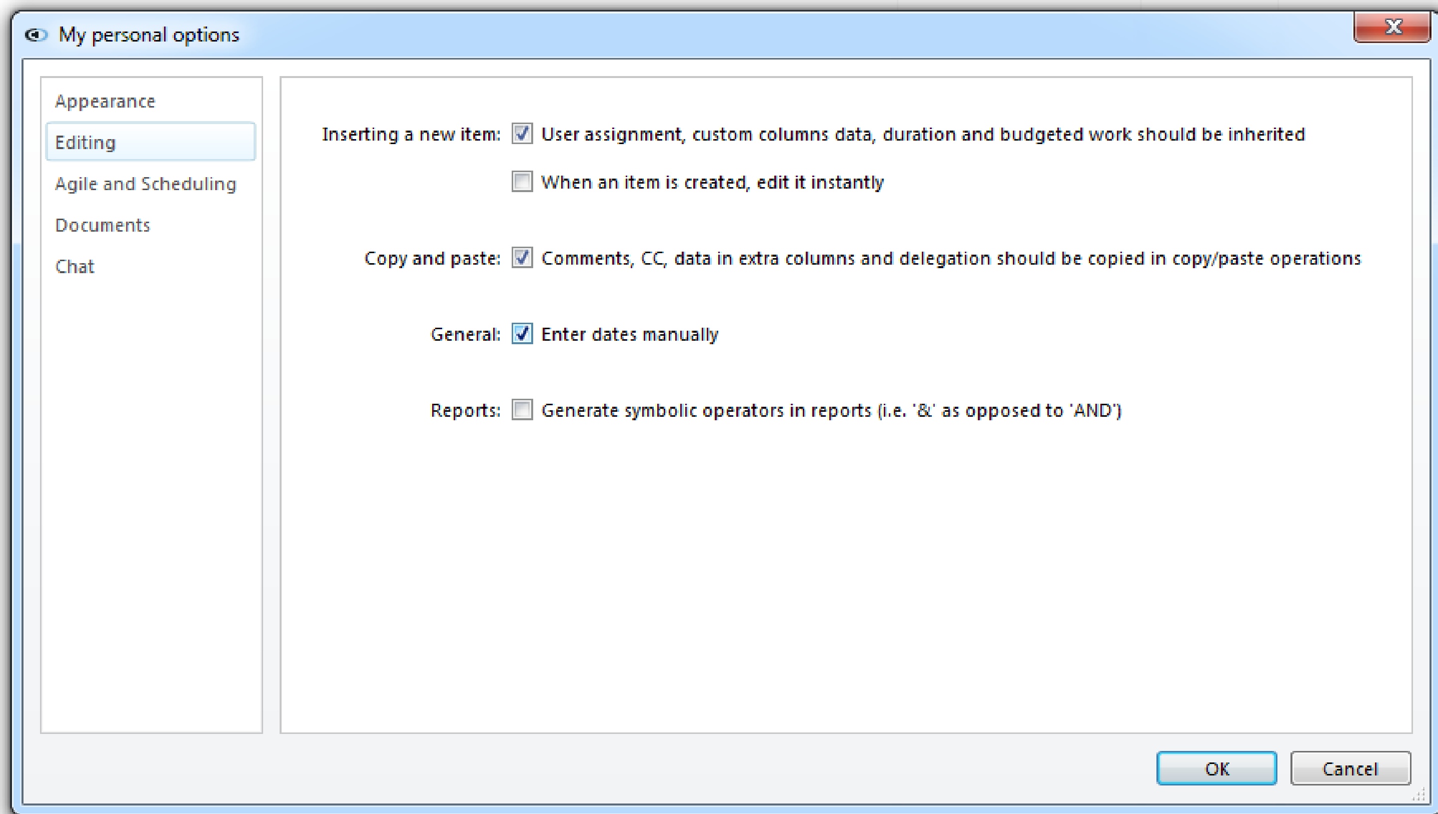
Tip: Proceed to the [Working with the timeline view] section of this help manual to learn more about working with visualized activities.

Changing the activity name

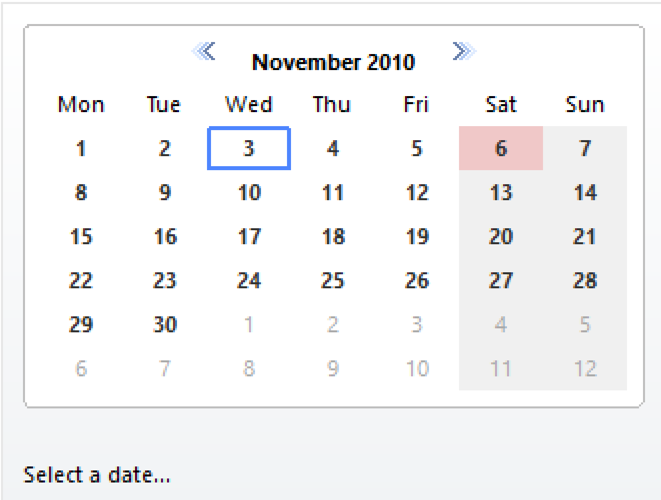
Double-click on a task in the "activity name" column and write or change the name of the task. You can also change the activity name in the activity details window, located below the timeline list.

Setting the start or finish date

Double clicking on a date allows it to be set. How dates are entered is selected in My personal Option under Editing.



With the Enter dated manually unselected a calendar selector is used for entering dates.



White-colored days indicate working days, gray days are free, and red-colored days indicate holidays. Change the calendar month by clicking on the blue arrows on either side of the month title.

You can also change start and end dates by simply dragging the edges of the task in the timeline view. This is covered in the "Working with the timeline view" section of this help manual.

Changing the duration of a task

You can change the duration of a task by double-clicking on the task in the "duration" column. The duration of the task is specified in whole days or in hours. You can "pack" a number of smaller activities into the schedule by giving them short durations (Example: 2 hours).Use Arrange task (Ctrl + Shift + A, or Cmd + Shift + A) or connect tasks to align and pack them.

Note 1: Changing the duration of a task automatically affects the finish date.

Note 2: When working with the "Fixed work" method, the duration of a task is specified by the assigned user and the budgeted work hours. This is covered further in the "Fixed work and fixed duration" section.

Working with the timeline view

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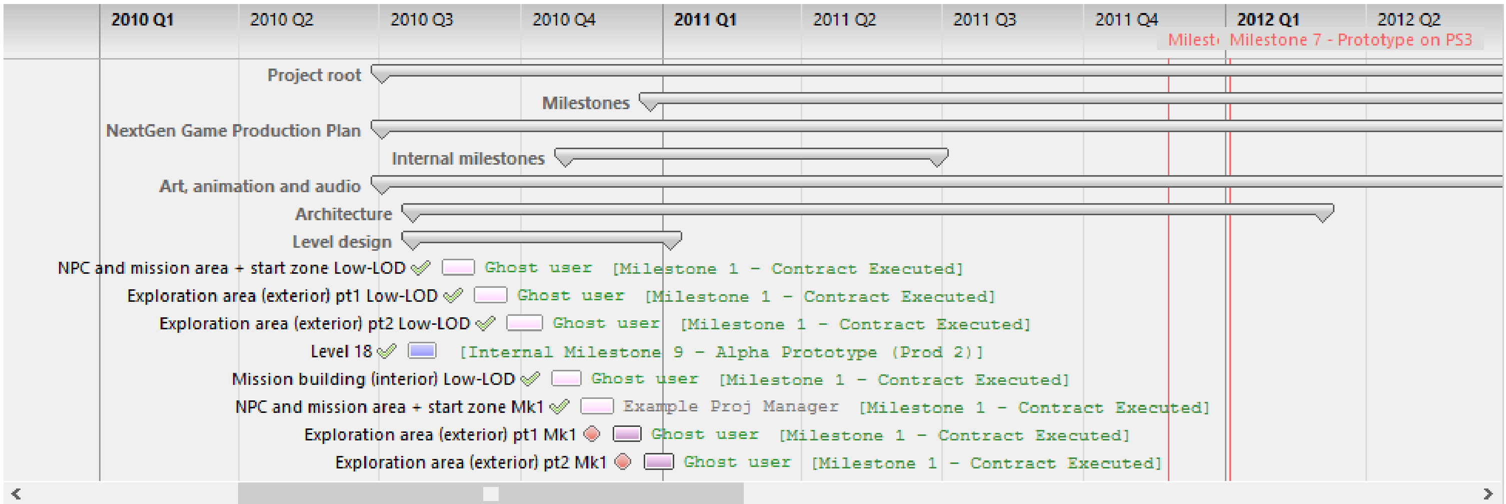
The timeline view is a cornerstone in visualising and editing activities and the connections between them. This is an introduction to the most important aspects of the timeline view.



Changing the position of the time scale

Hansoft recommends that you use the right mouse button and click in the view when you are not hovering above an activity, dragging the time scale along with your mouse. This is the quickest and most effective way to navigate.

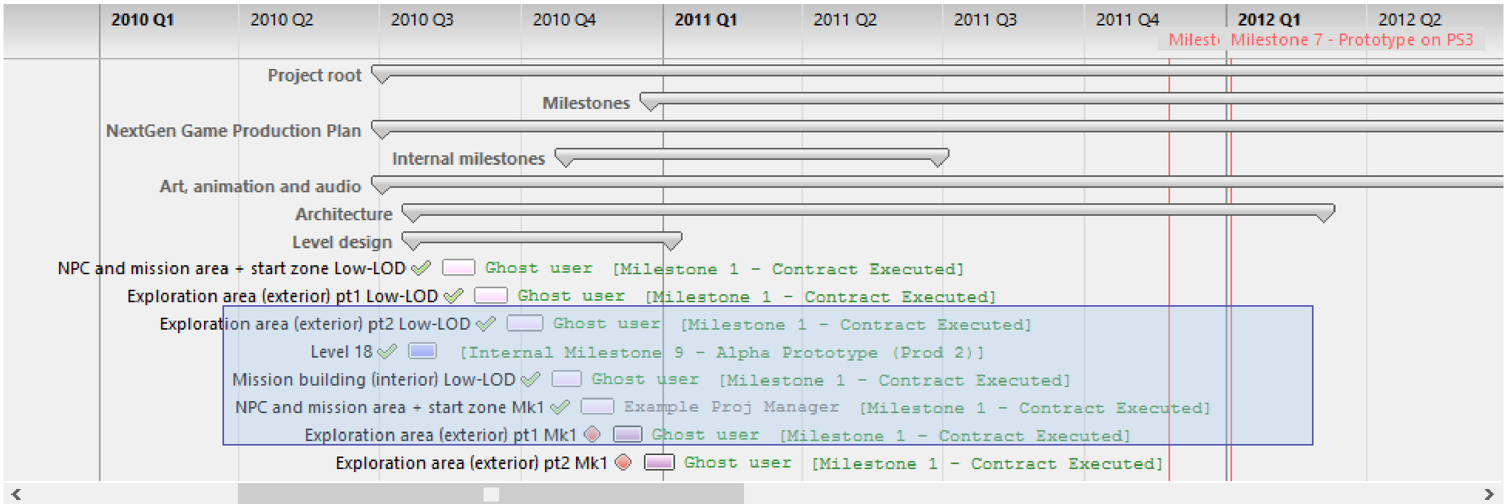
You can also use the horizontal scroll bar located below the timeline view. According to the timescale the earliest task begins when the scroll bar is at the far left. When the scroll bar is at the far right, it means that this is when the latest task ends according to the time scale.

Zooming in and out the time scale

You can either click the "Zoom in" and "Zoom out" buttons located in the main timeline toolbar or use the mouse scroll wheel while pressing the Ctrl button on the keyboard (Cmd button on OSX).

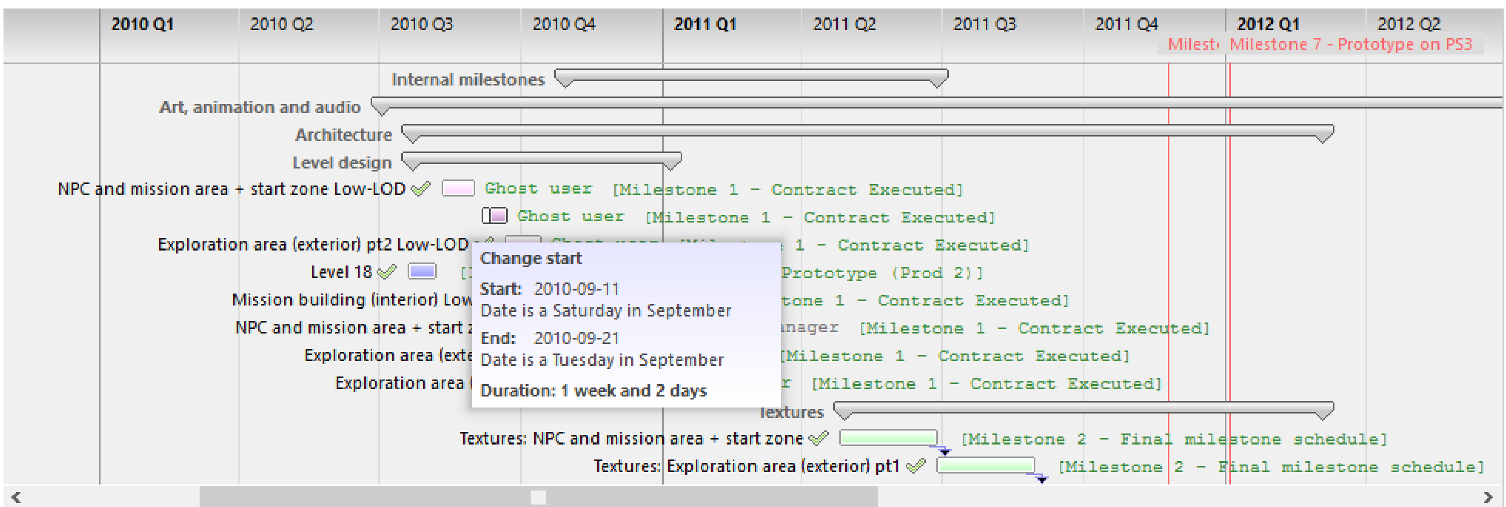
Time box selecting

Use left mouse button and drag across the timeline view.



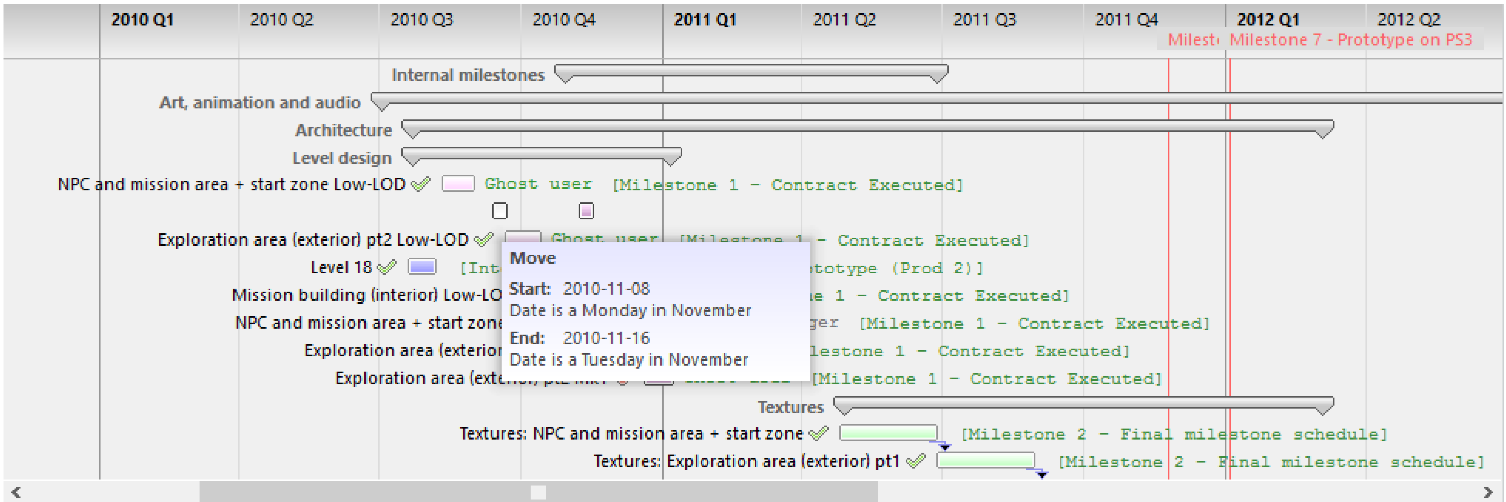
Changing the start or end date of a task

Change the position of the mouse to the far left or right of the task and then press the left mouse button. The information window will give you specific details on the change and how it will affect the task.



Moving an activity

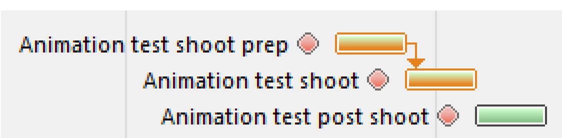
You can move an activity (both tasks and milestones can be moved) by moving the mouse to the middle of the task or activity and pressing the left mouse button.



Connecting activities

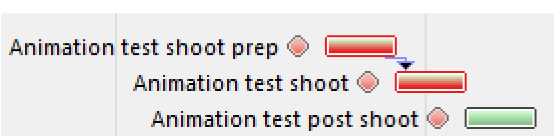
A cornerstone in the project planning is to set logical dependencies (referred to here as connections) between activities. This is an easy (and sometimes fundamental) way to work with large portions of the plan without moving every single task every time.

You can connect two activities by pressing the left mouse button on an activity, moving the mouse to another activity, and then releasing the mouse button. The action is indicated by an orange arrow and orange coloured activities.



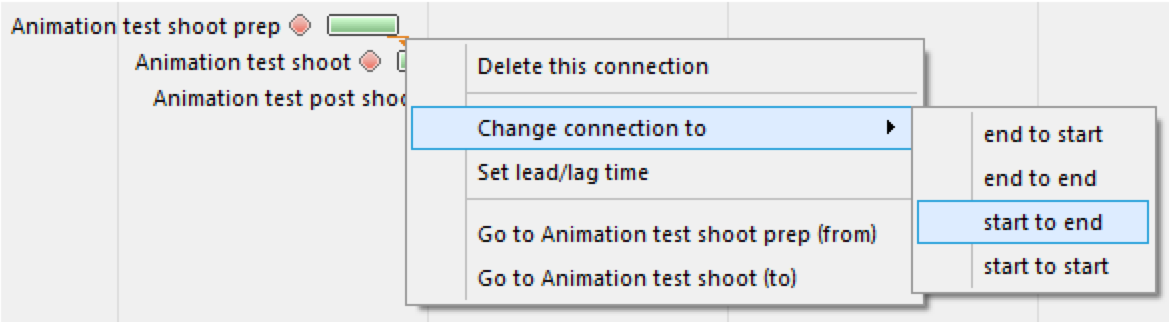
The activity you disconnected from (the first) now affects the activity you connect to (the second). The start date of the second activity will now always be later than the end date of the first activity.

You can not create illegal dependencies:



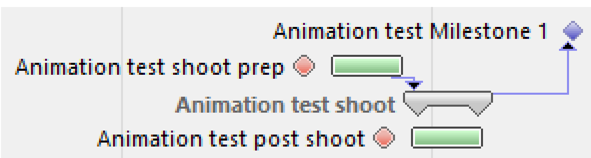
A blinking red arrow along with red coloured activities indicate that the connection you are about to make is impossible.

You can configure the connection by clicking on it with the right mouse button:



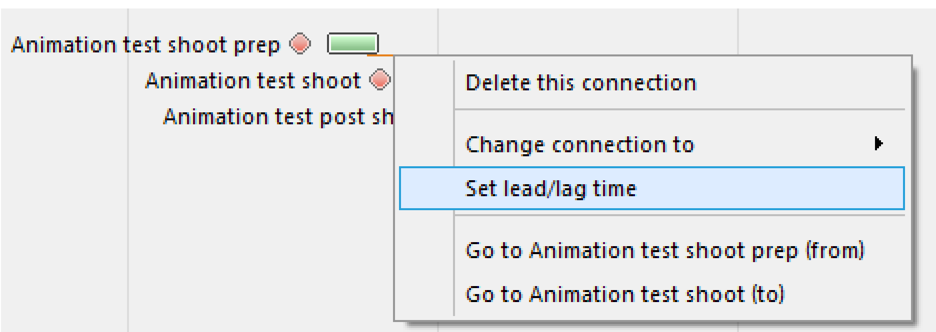
When you connect two activities, the end date of the first task affects the start date of the second task. This is referred to as an "end to start" connection. This can be changed to other types of logical dependencies that work in the same way. Select the type of connection that suits you best.

You can also connect summary activities to activities and vice versa:



More about summary activities is located in the "Indenting tasks and summary activities" section of this help manual.

You can set the lead/lag time on a connection by right clicking on the connection and selecting 'Set lead/lag time':

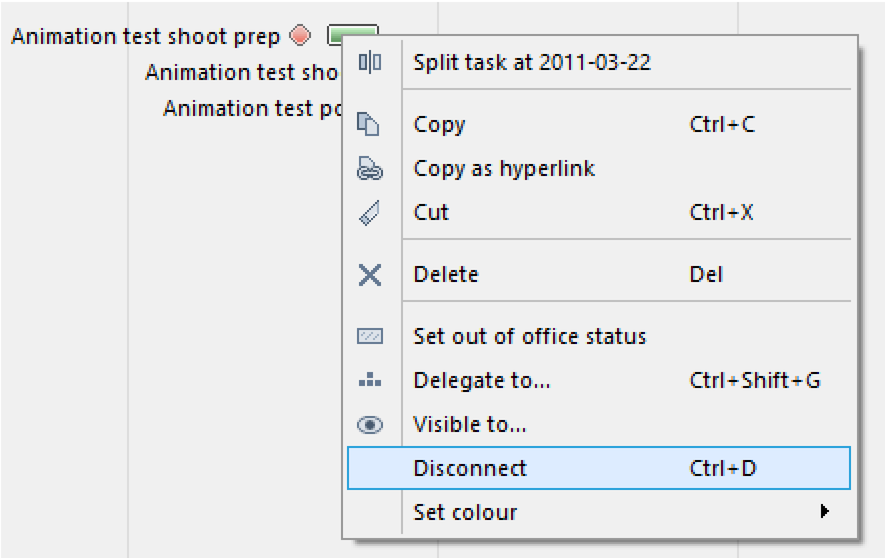


Deleting connections

Right click on the connection and select "Delete this connection" from the menu.

The activity menu

If you click the right mouse button on an activity in the timeline view, a menu will pop up:



You can now perform the following actions:

- You can split up a task into two or more parts. This can,for example, be useful when you have a task with long duration and you have to make room for out of office.
- Cut deletes and copies the activity to the Hansoft Project Manager clipboard and to the Windows clipboard as raw text information.
- Copy simply copies the activity to the Hansoft Project manager clipboard, and to the Windows clipboard as raw text information.
- Delete deletes the activity.
- Disconnect removes all connections to and from the activity.
- Set colour sets the colour of the activity
- Please Note: All actions can be undone.

Indent, outdent and summary activities

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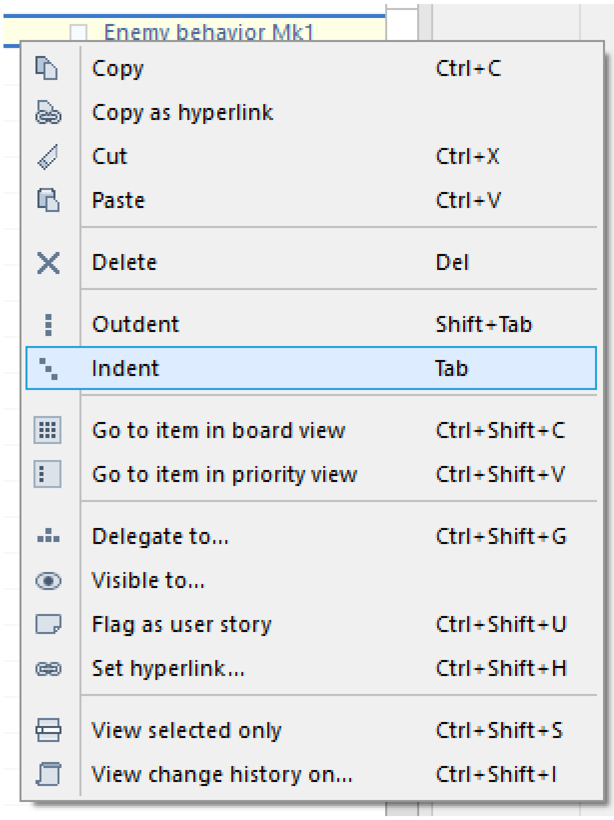
A corner stone in arranging the activity list is through indenting and outdenting activities.

This is primarily used when...

- You want to split up the plan into categories, users or sub-projects.
- You have a large project plan and want to work only with a portion of it. You can collapse the part of the project plan you want to hide and work only with visible part.



Indenting and outdenting

Select the activities you want to indent or outdent in the timeline activity list.

1) Select Indent or Outdent from the menu by clicking the right mouse button over a task in the list.

2) Press Tab on the keyboard to indent or press Shift + Tab on the keyboard to outdent.

Summary activities

When you indent an activity the activity above it will become a summary activity. "Design engine" in the picture above is an example of a summary activity. The summary activity can be collapsed and expanded just like a regular tree, just click the minus and plus signs to the right of summary task name.

The start and end date of the summary activity is decided by the earliest and the latest task under it in the timeline activity list.

You can connect activities to summary activities and vice versa. The connection will then affect all activities under the summary activity.

More functions when editing a project plan

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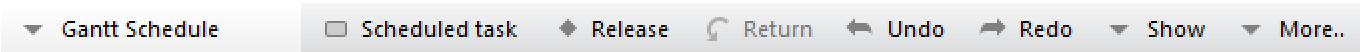
Multiple undo/redo

On the main timeline toolbar you'll find the undo / redo buttons. Hansoft Project Manager supports multiple undo and redo steps, which often comes in handy when planning for large projects.

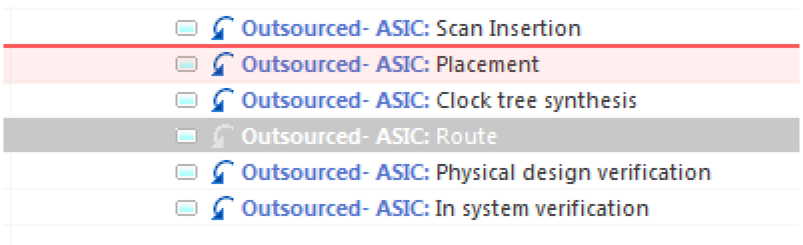


Tip: You may use Ctrl + Z for undo and Ctrl + Y for redo on the keyboard (Cmd + Z for undo and Ctrl + Y for redo on OSX).

Changing the vertical placement

If you drag the mouse up or down you can change the vertical placement of the activities.

A blue activity indicates that the vertical placement is legal. A red activity indicates that there is an illegal circular dependency between the activity and the summary activity above it. Hansoft Project Manager will automatically disconnect the illegal activity.



Basic actions

The following actions can be performed on the selected activities in this menu:

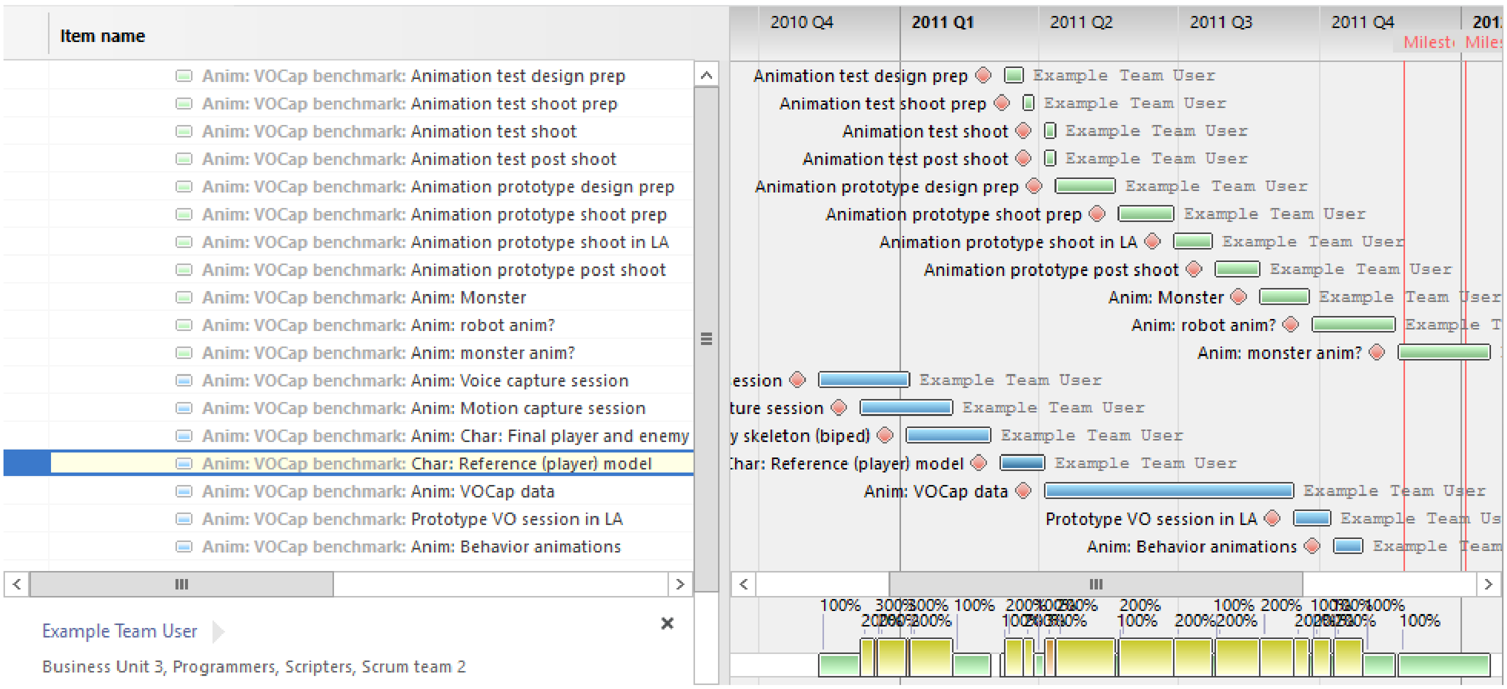
- Cut deletes and copies the activity to the Hansoft Project Manager clipboard and to the Windows clipboard as raw text.
- Copy simply copies the activity to the Hansoft Project Manager clipboard and to the Windows clipboard as raw text.
- Paste pastes the current Hansoft Project Manager clipboard contents into the timeline activity list, above the currently selected task.
- Insert task Inserts a tasks above the currently selected task.
- Insert individual allocations inserts an individual allocation in the bottom. This is an easy way to examine user allocation, and detect possible conflicts between users, or between projects.
- Delete deletes the activity.

•Outdent outdents the current selection. Read more about this in the Indent, outdent and summary activities section of this help manual.

•Indent indents the current selection. Read more about this in the Indent, outdent and summary activities section of this help manual.

•Disconnect removes all connections to and from the activity.

•Set color sets the color of the activity.



Read more about individual allocations in the Portfolio allocations section of this help manual.

Advanced actions

Transform tasks to milestones transforms all selected tasks to milestones.

Add or remove users opens the add/remove users window. Read more about this in the "Assigning users to tasks" section of this help manual.

Sort sorts the selected activities by start date, end date, description or duration. If you select a summary activity it will automatically select all activities under it and then sort.

Assigning users to tasks

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One of the fundamental aspects of Hansoft Project Manager is the sharing of information, specifically the project plan. When you assign users to tasks, these tasks will immediately be visible to the assigned user - and to the whole project team.

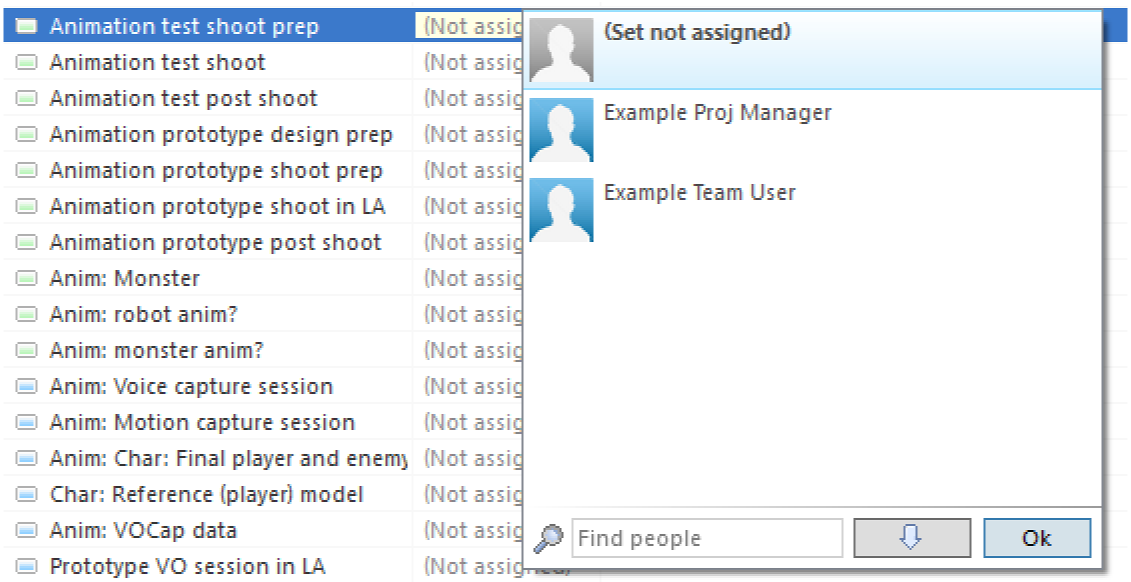
In the activity list, you can assign users to tasks and use the Portfolio allocations tool to see how that user is currently allocated, to avoid over- and under-allocation.

If you want help on adding users to the project go to the section on Allocating users to a project.

Assigning a user to a task

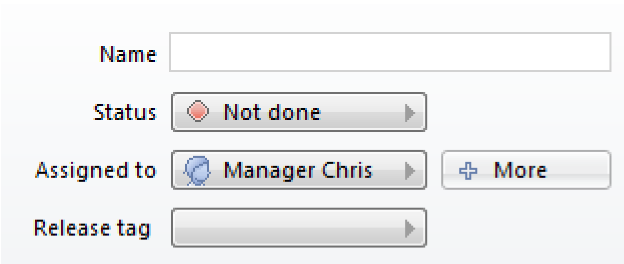
A quick way to assign one user to a task is to double click the field under the column Assigned to, or to select it in the Item Details window. The user you select will automatically be allocated 100% of the time in the project.

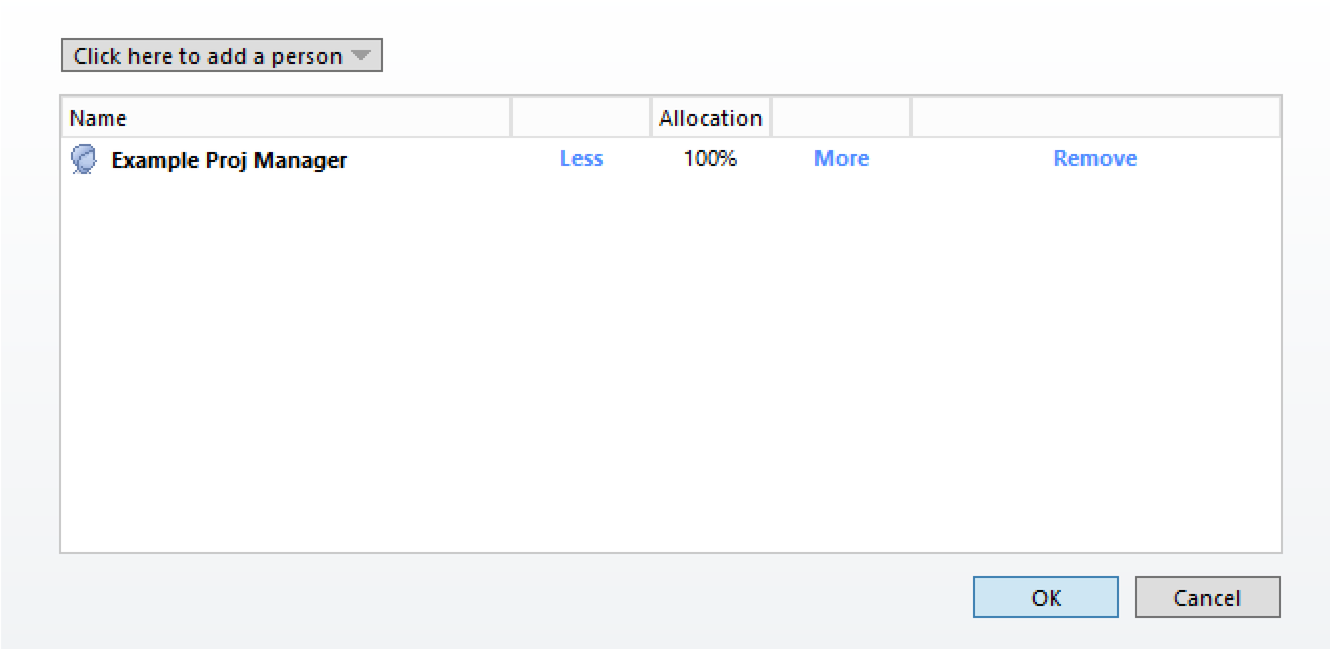
You can filter on different user groups, or find users by way of a free text search. This is very good for locating users in large teams.



Adding and removing multiple users

If you want to add or remove more users, or adjust the allocation of a user for a given task, open the "Add or remove users on selected activities" window. Do so by selecting the "Add or remove users" menu item in the main timeline activity list menu, by pressing Ctrl + R (Cmd + R) on the keyboard or by pressing the "More..." button on the activity details window (to the right of the user drop-down).

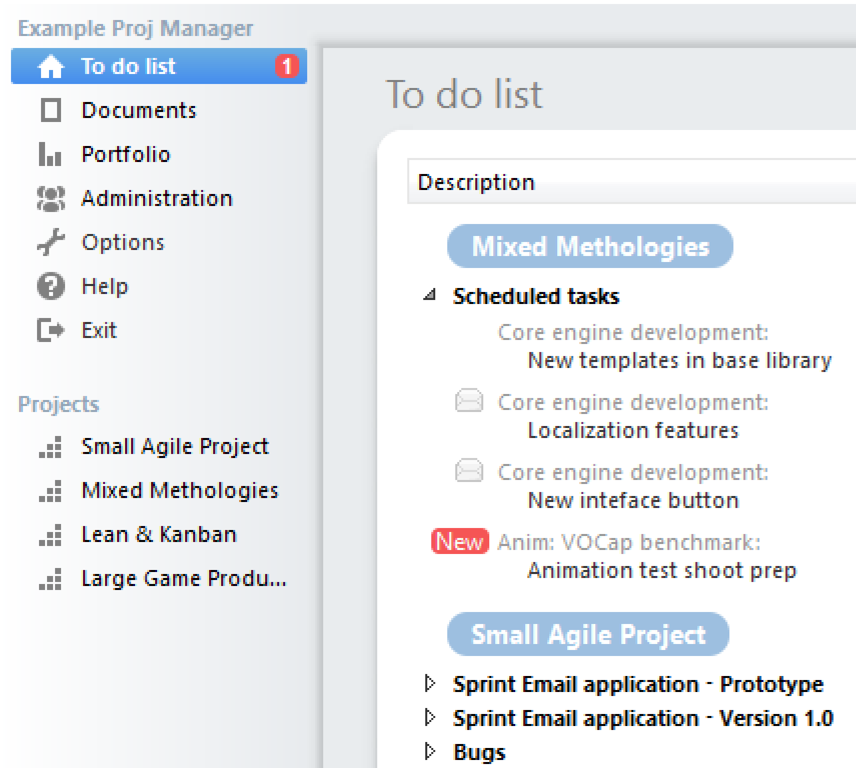




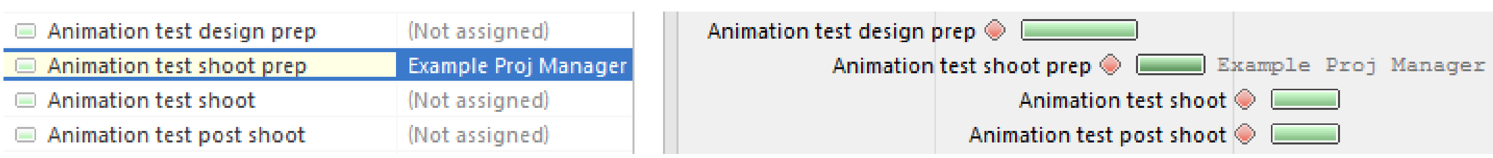
Here you can add users to the selected activities by selecting a user from the drop down list. You can also change the allocation of a user on a task by clicking the More and Less buttons, or by directly specifying allocation in the edit field.

Assigning a user to a task

Once you've assigned a user to a task, that task will appear under the To do list for that user.



When you assign a user to a task, it will also immediately appear in the "Project Schedule" for everyone to see:



Fixed duration and fixed work

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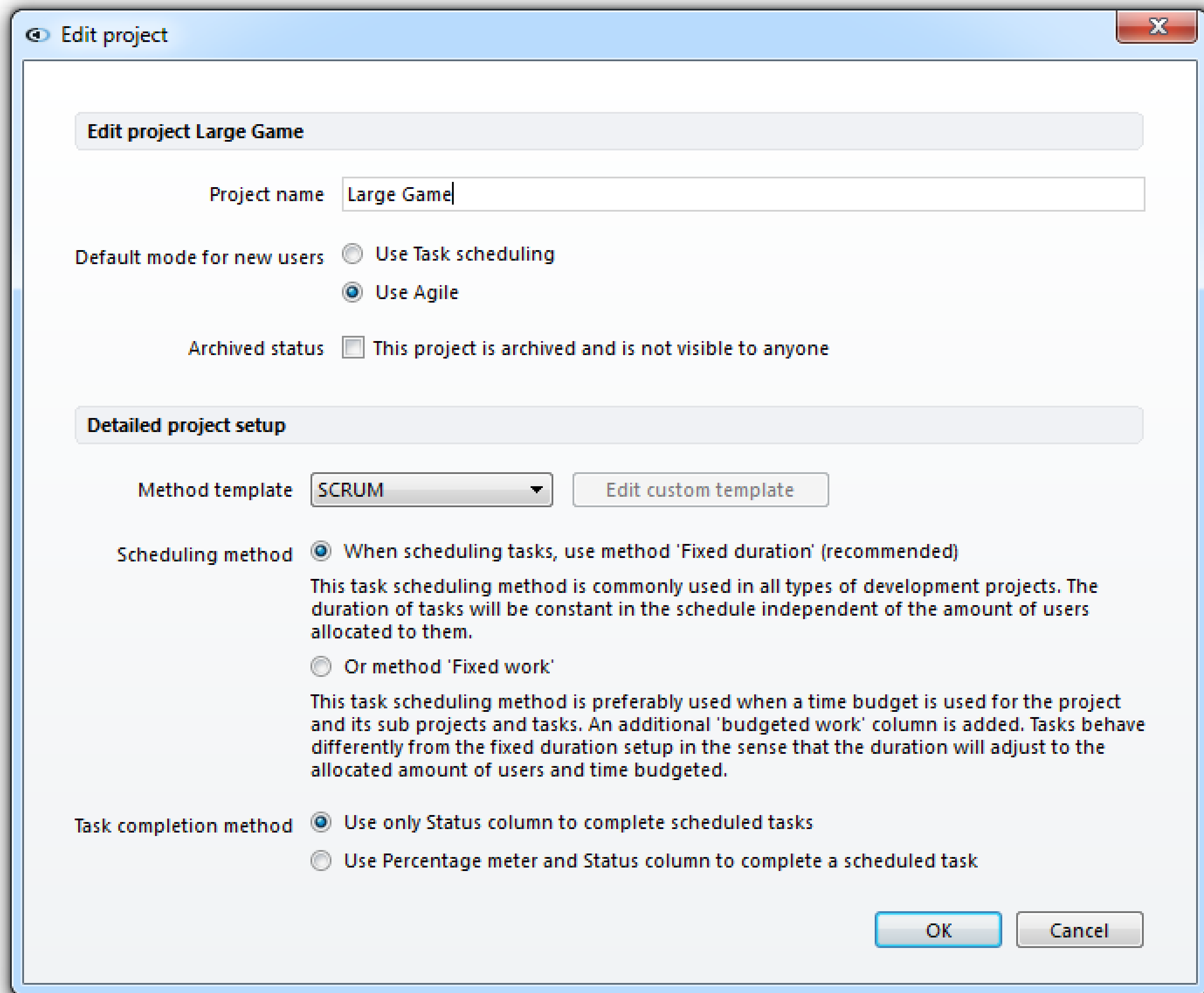
When you create or edit a project, you have the choice of two different task scheduling project methods: Fixed work and Fixed duration.



When using the Fixed work scheduling method an additional column for Budgeted work is added and shown in the activity list:

Budgeted work
248h
8h
64h
32h

Fixed work introduces both the Budgeted Work and the Earned value columns. This method focuses on budgeted hours rather than simply the duration of a task. This means that the duration of a task is automatically calculated by the budgeted hours and the amount of users put to this task. Note that the Earned value columns requires that the Earned value module is activated.

Example: You have budgeted 32 hours for a task (and use a standard 8 hour working day). Within this scenario, the task would then take one user 4 working days to perform. Alternatively, if we were to put two users on the task, it will take just 2 working days to perform. To take the example even further, having only one user working at a capacity of 50% on the task, it would take 8 working days to perform.

Fixed duration uses a simple yes/no condition to measure if the task is complete whereas the Fixed work method uses a percentage value to measure the degree of completion of a task. The actual work column automatically computes how many working hours have been added to the task, based on the percentage of completion of the task and the budgeted work.

Arranging tasks (and user leveling)

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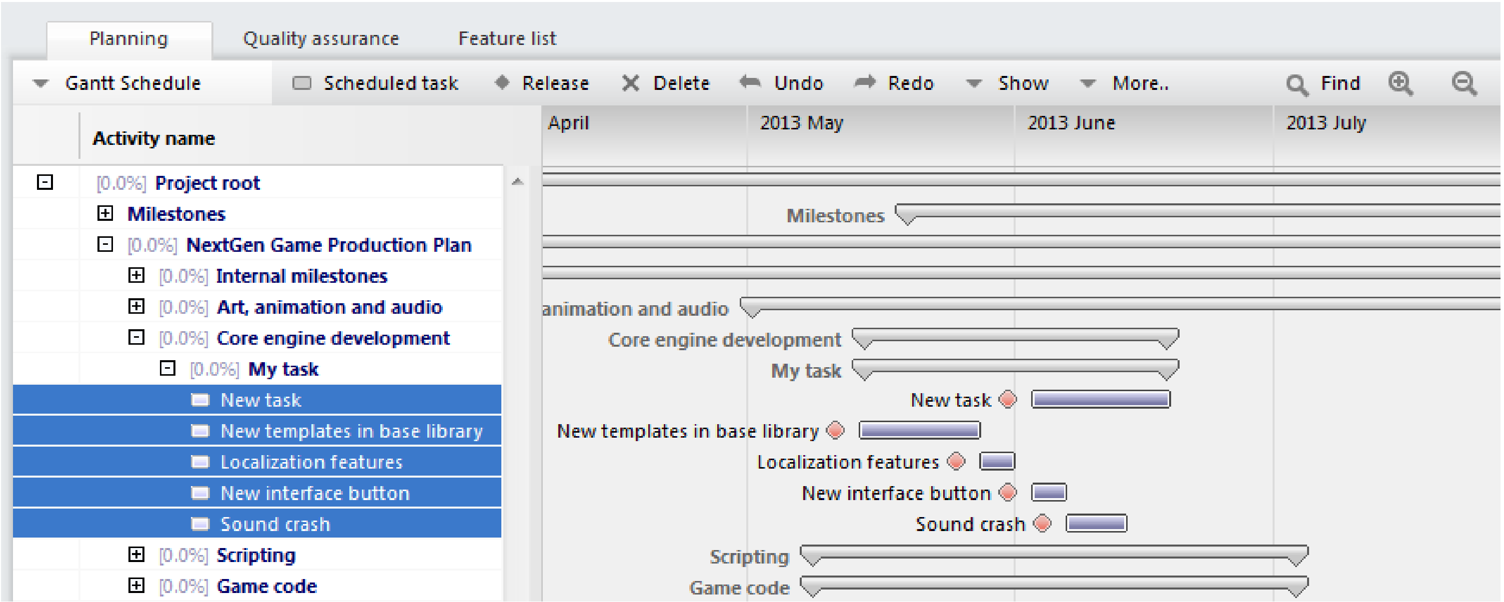
Hansoft has support for traditional user leveling in task scheduling. However, leveling as an approach to balancing workload is generally a bit of a dead end in growing development teams. Many teams today have previous experience with leveling, using standard scheduling tools like Microsoft® Project®, before their teams became too large.

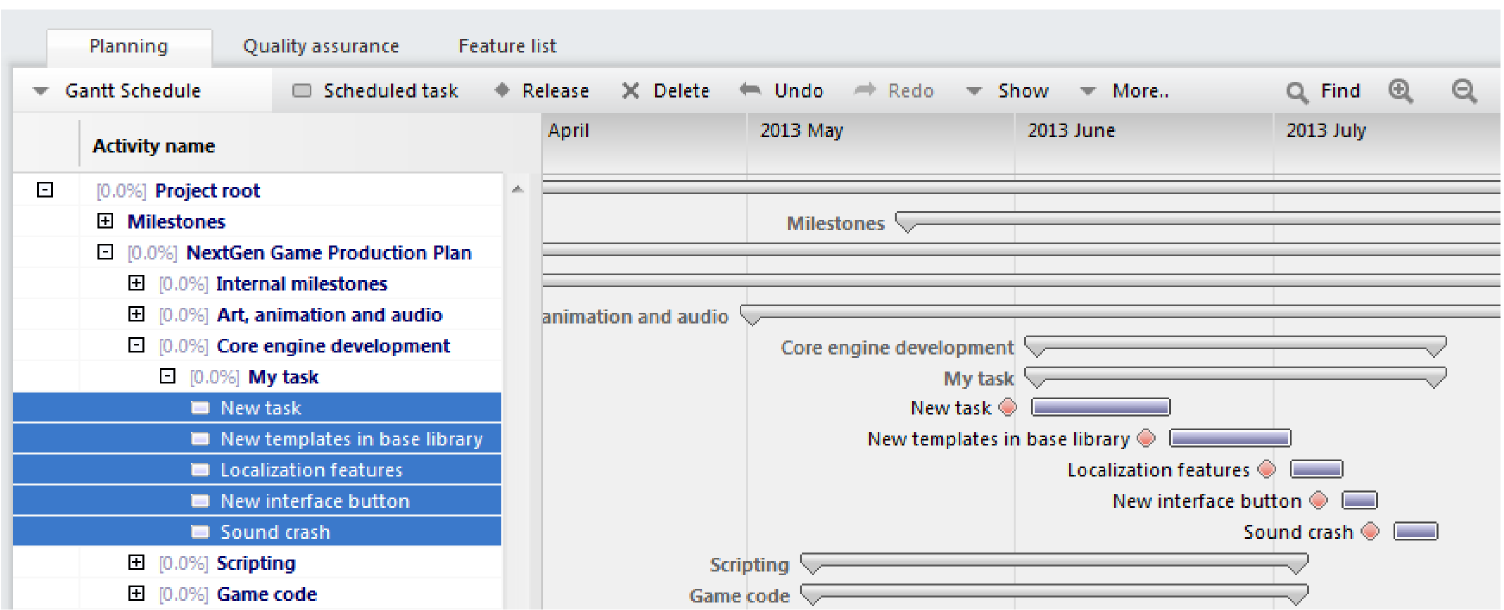
Hansoft is designed to support and enable an approach focused on delegated responsibilities and empowered teams which have a more collaborative approach to scheduling. We have found that this approach allows for great gains in company productivity.

User leveling and arranging tasks can be done in a variety of ways that can be seen in the following examples:

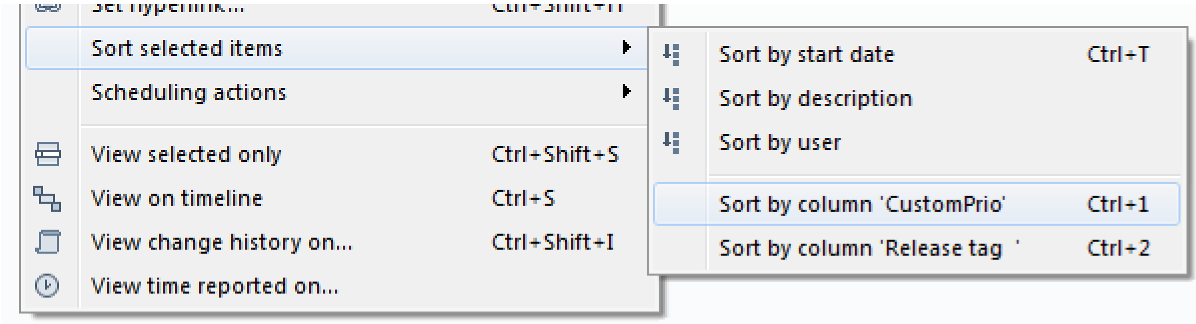
A set of tasks that you want to arrange can look like this:



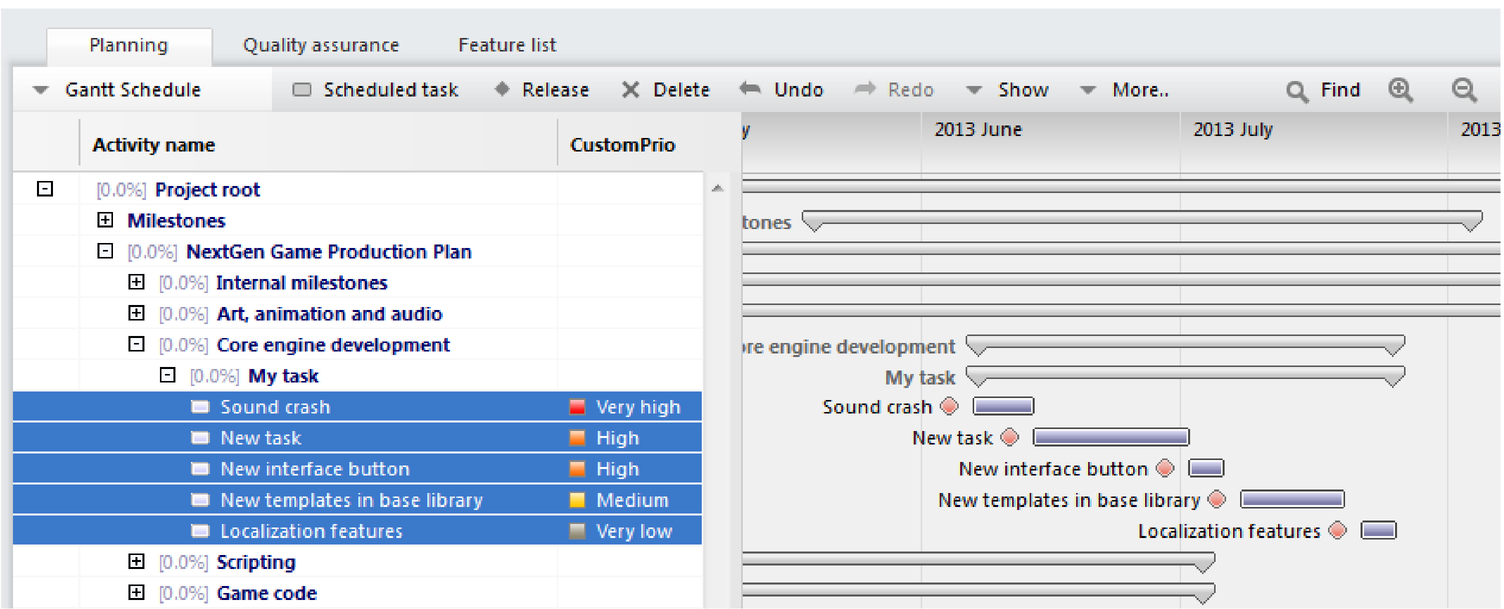
You can arrange tasks by using keyboard shortcut Ctrl + Shift + A (Cmd + Shift + A). The starting point of the new arrangement will be the first selected task:



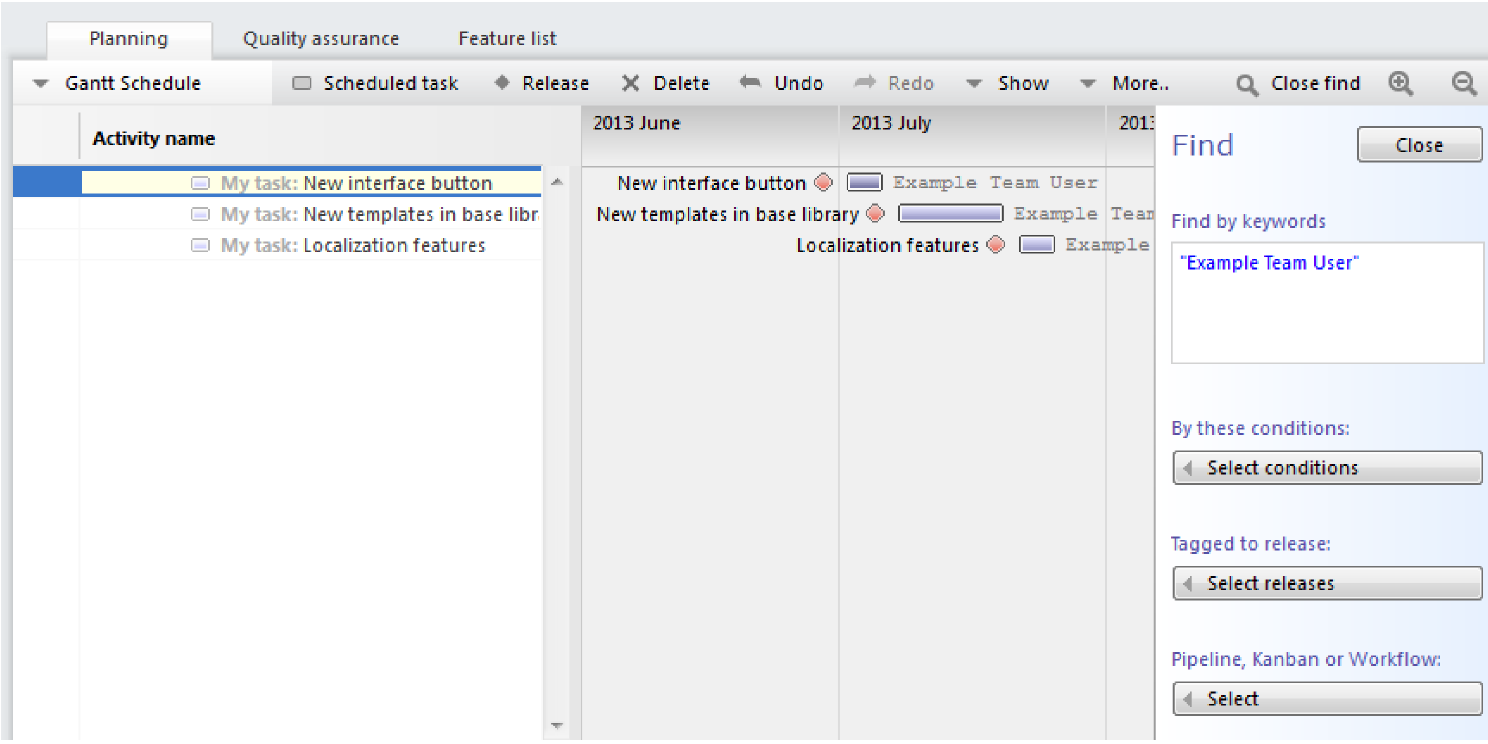
It is recommended that if you want to perform user leveling based on a priority column, you sort the custom columns first before arranging them (press Ctrl + 1, or Cmd + 1)



You can now arrange them by numeric data in the custom "CustomPrio" column and user (in this case keyboard shortcut Ctrl + Shift + 1, or Cmd + Shift + 1).



To perform user leveling for one or more users, it is recommended that you use Show and then Show individual allocation and then select a user. Open Find and write the name of the user. In this way, you will get a clear view of the user when working with user leveling:



Using the product backlog in scheduling projects

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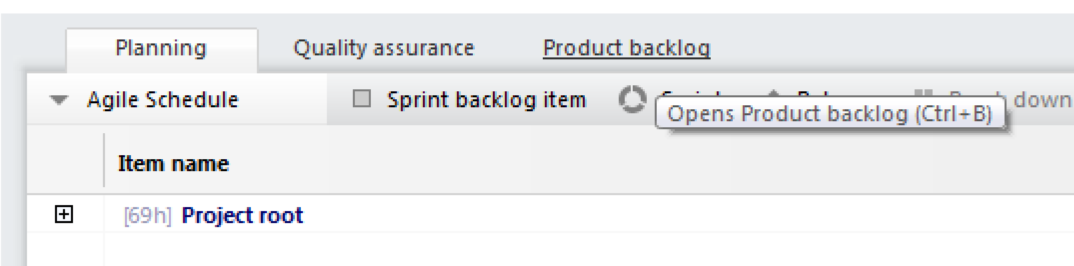
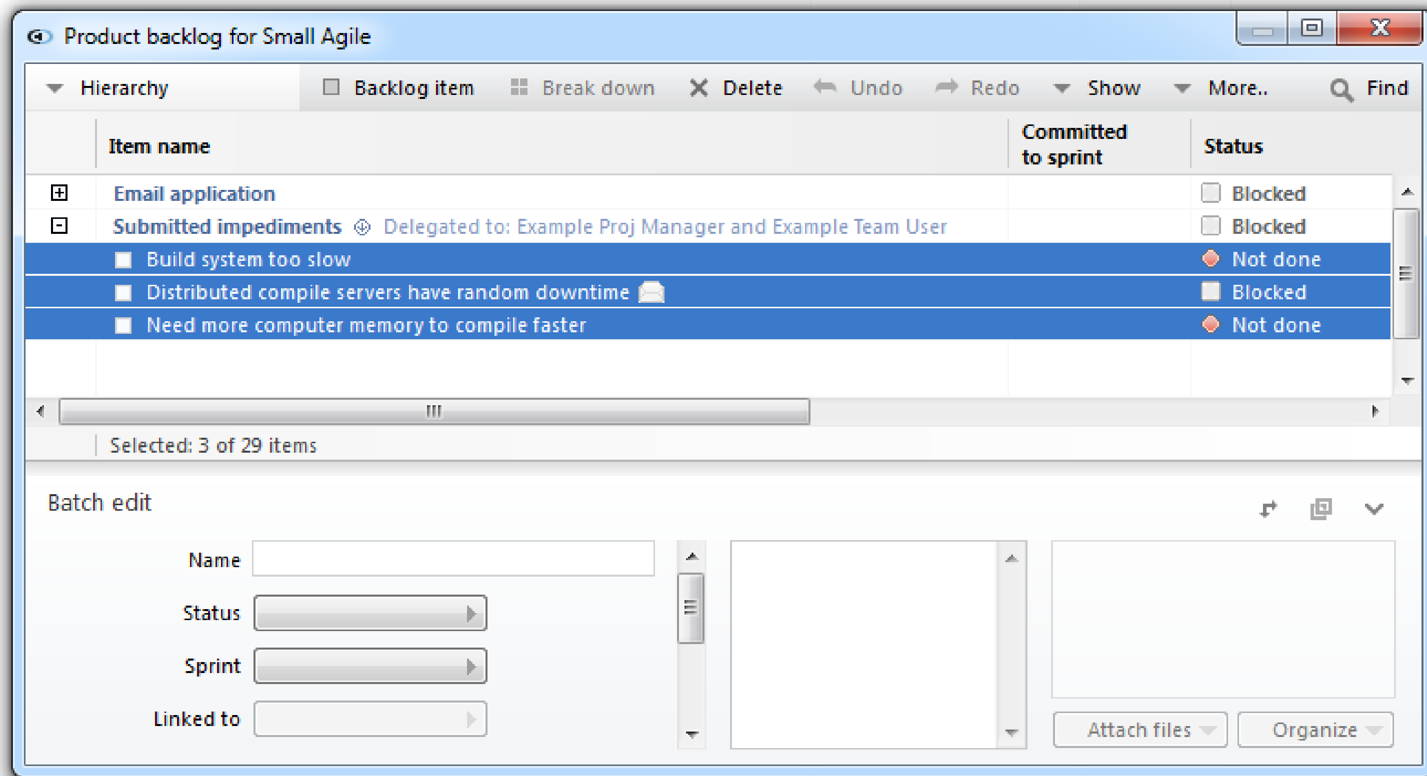
From Hansoft 5.3 and onwards you commit items from the product backlog to a schedule. This is very useful because features can be listed, categorized and analyzed in the product backlog and then planned out in the project view.

Read more about the functionality of the [product backlog](#) here.

Click on Product backlog on the navigation bar. You can also press Ctrl + B, or Cmd + B on OSX.

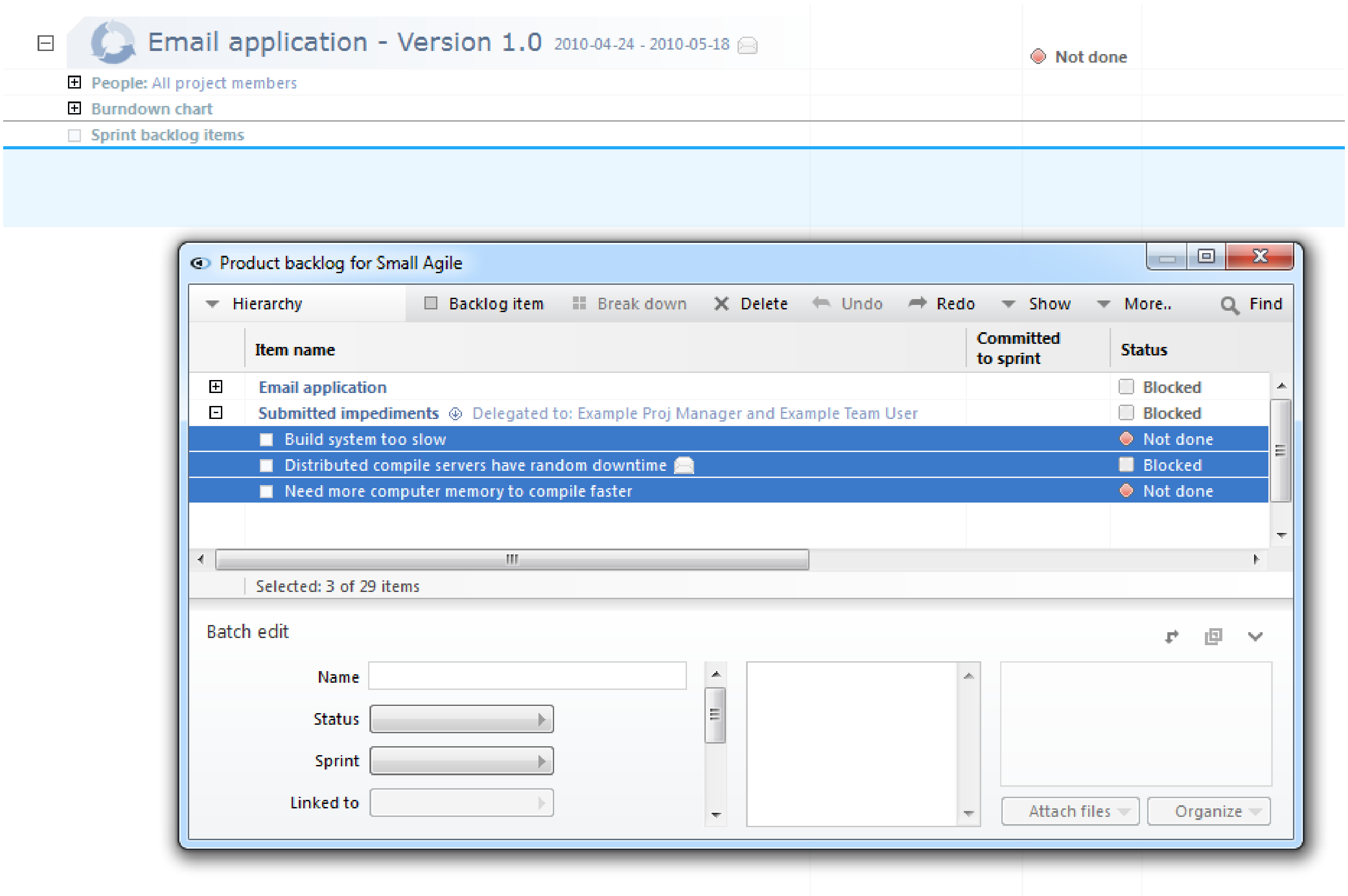


Create features, enhancements or other items in the backlog:

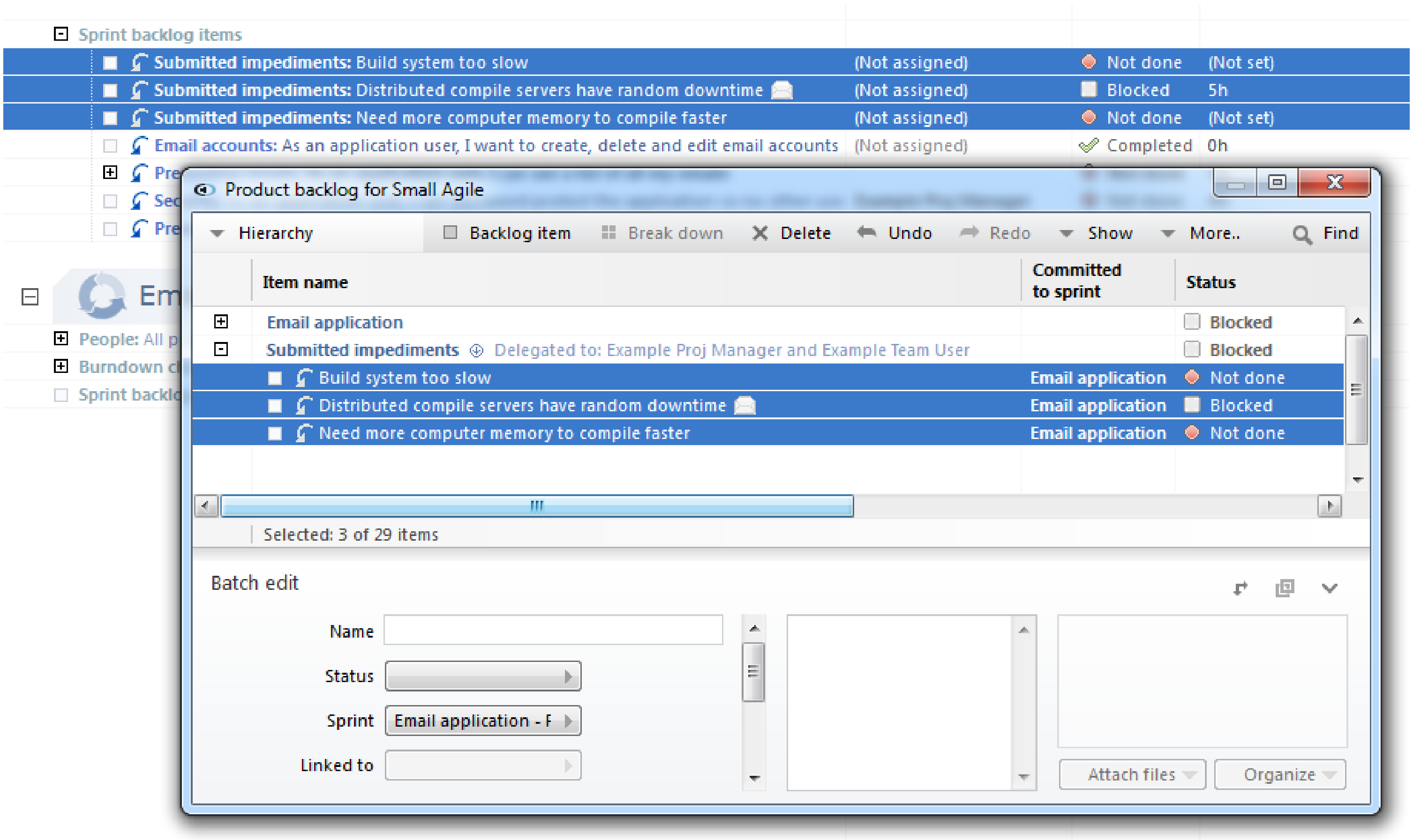


Borrowing a functionality originally from agile this lets you create items in the backlog and then committing the to the schedule.

Drag the items from the backlog to the schedule. Items will stay in the backlog while they at the same are planned in the project schedule:



The view with the items in both the sprint backlog and the product backlog:



More important functions

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Showing and hiding items

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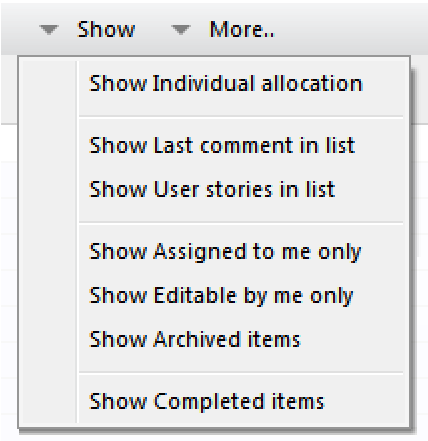
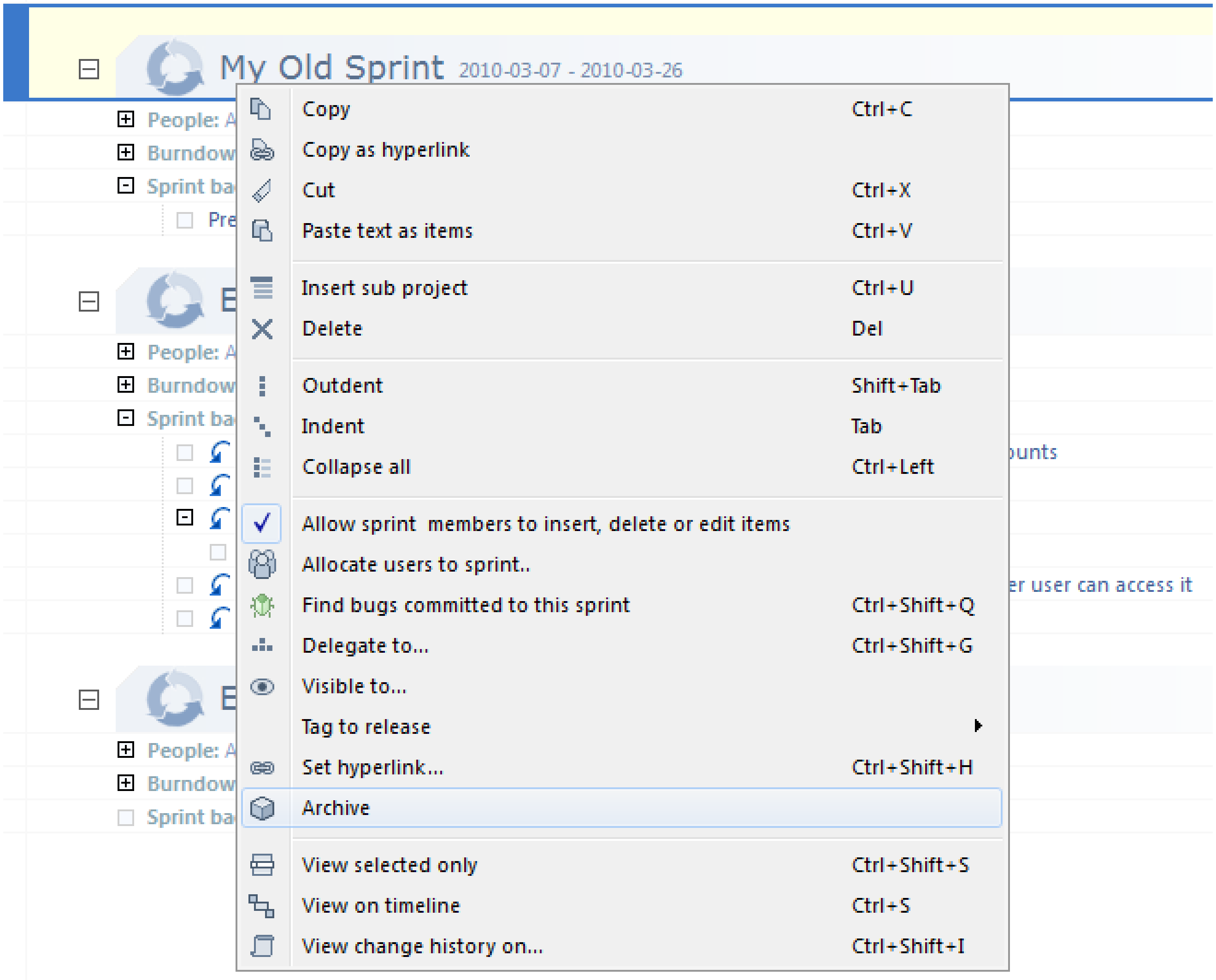
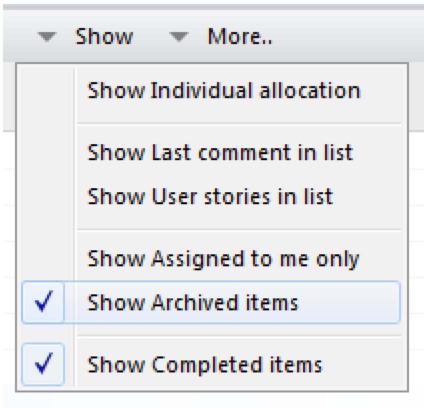
A useful tool in Hansoft is the Show and Hide option available on the toolbar in the project view and product back-log. Options for Showing comments and User story or Detailed description text are available in in Portfolio Find and the Quality Assurance part of Hansoft.



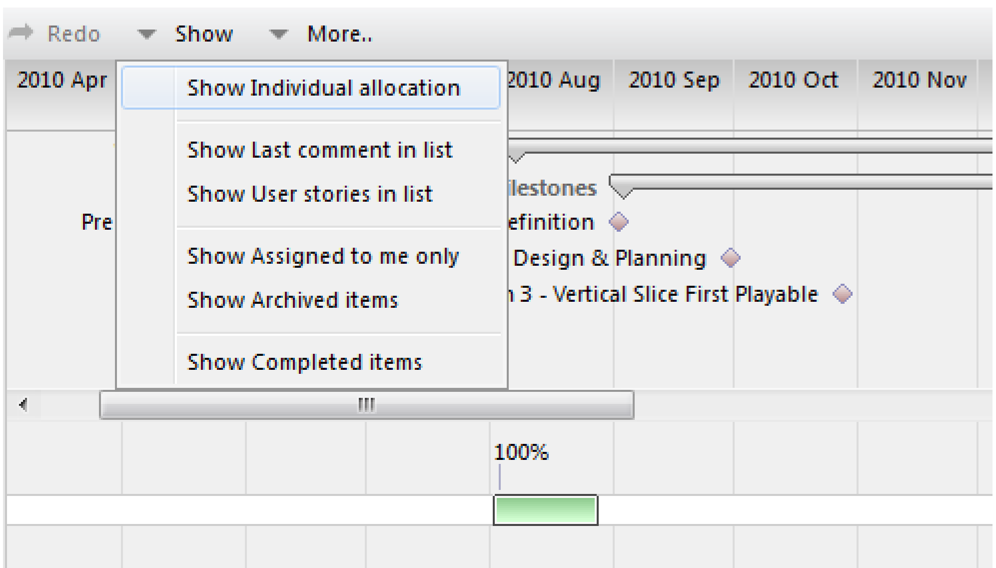
You can choose to hide or show archived items. Select a part of the project you want to hide by archiving in the right click menu:



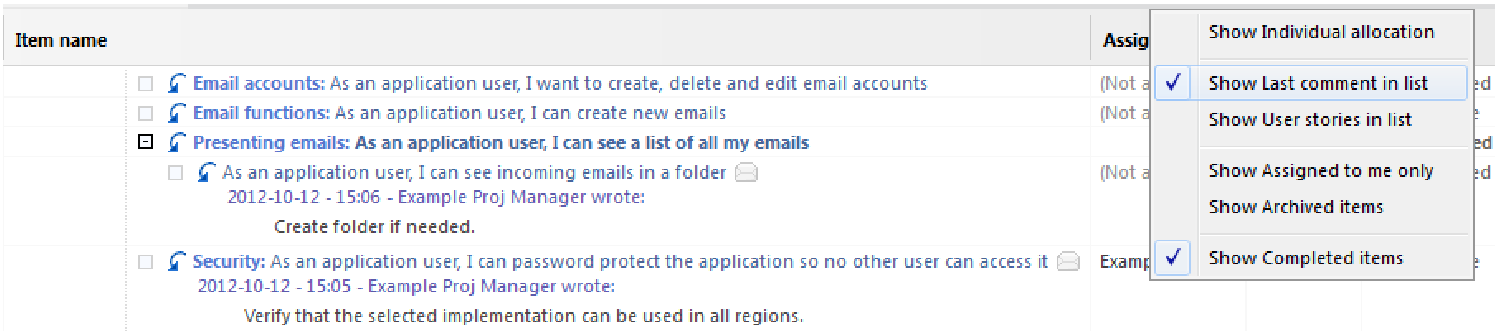
Show them again by selecting Show Archived items:



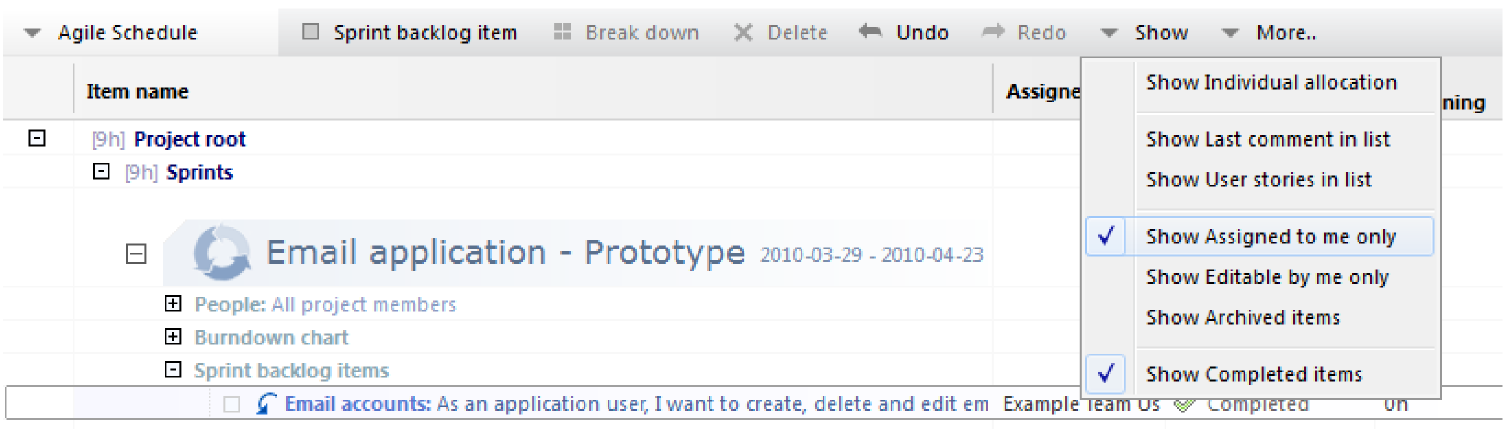
You can also show workload for individuals:



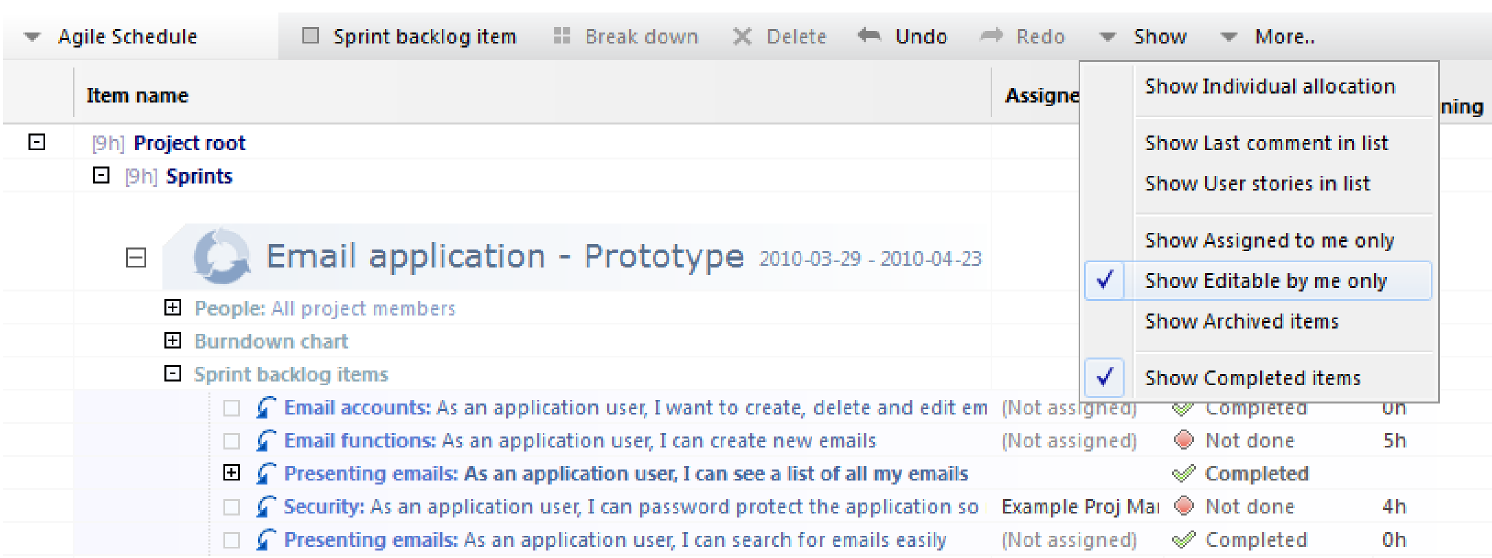
Show comments and User story text directly in the list view:



Show items assigned to me only:



Show items that you have permission to edit (either by delegation or sprint membership):



User view presets

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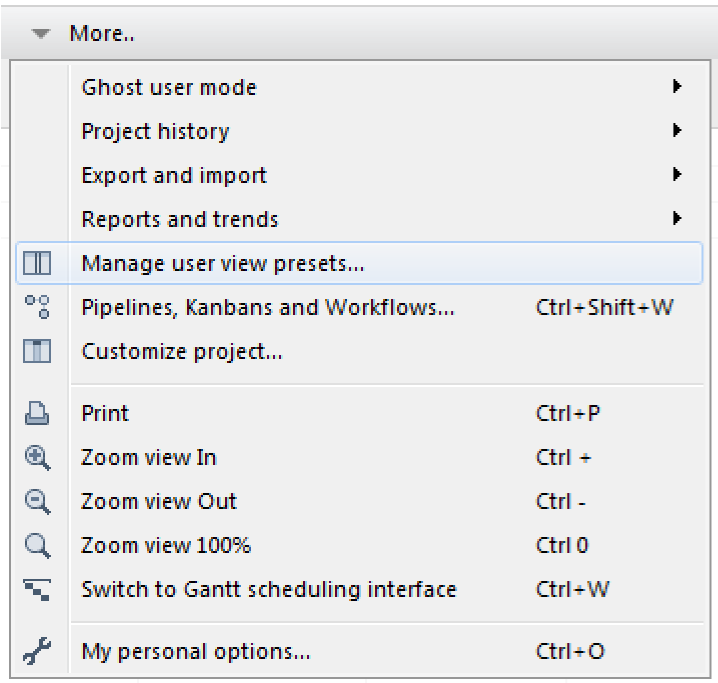
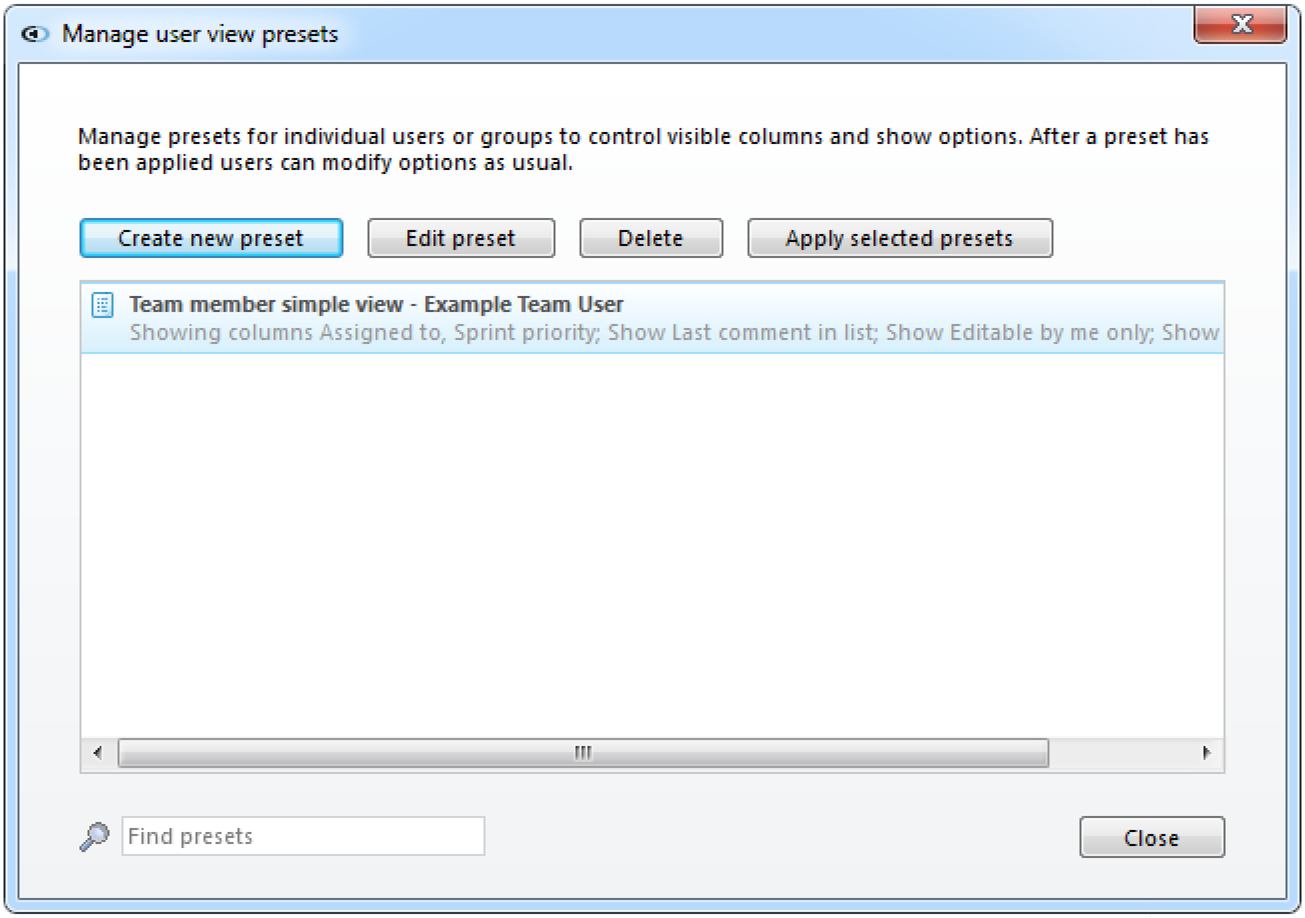
User view presets are used by project managers to control and simply the view options for team members.

Go to More and Customization and Settings and then Manage user view presets.



Create a preset and then select and apply the preset, it will have an immediate effect. A preset will never automatically be applied except for when users are connected to the project and belongs to a user group that is in the preset.



Milestones / release tags

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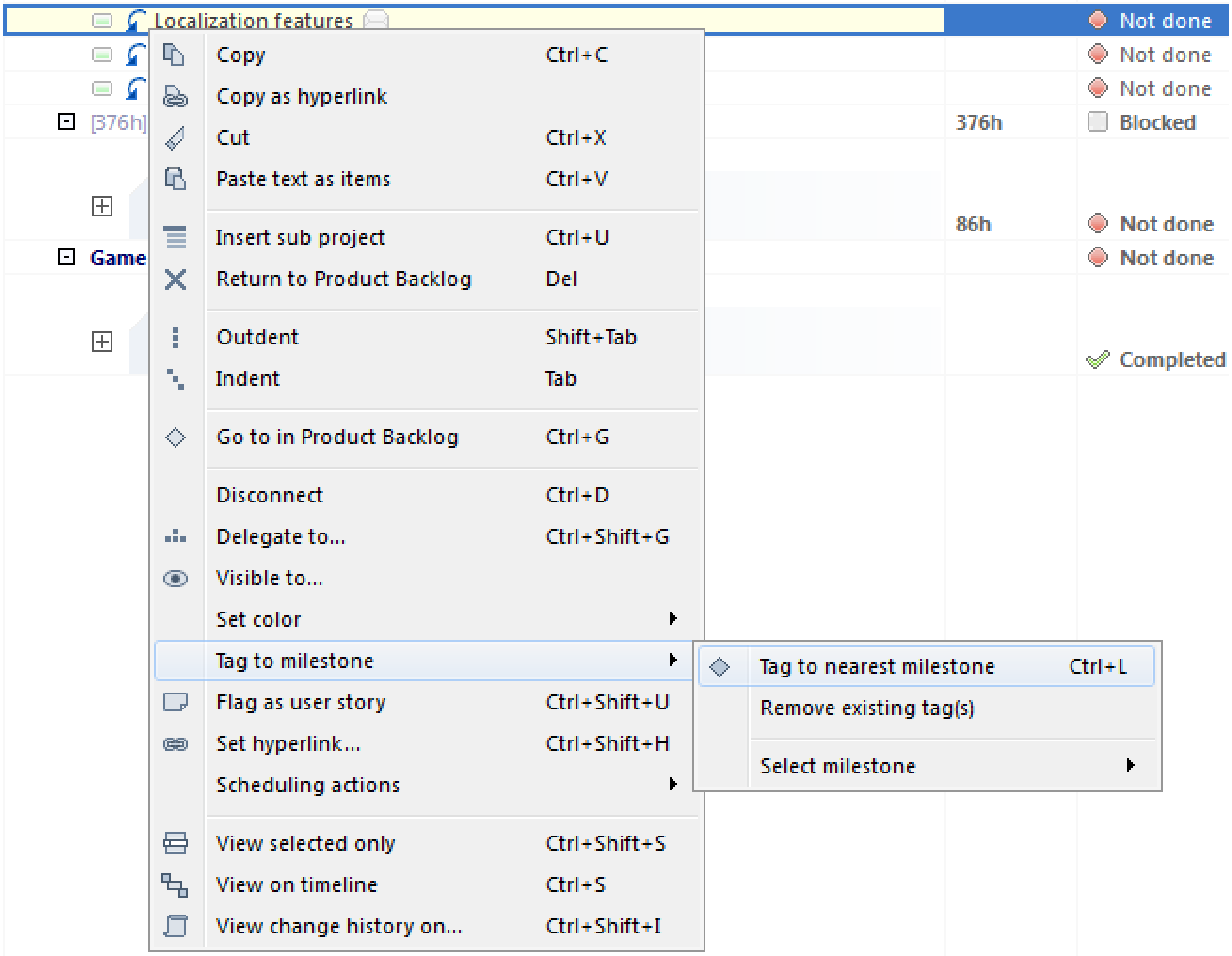
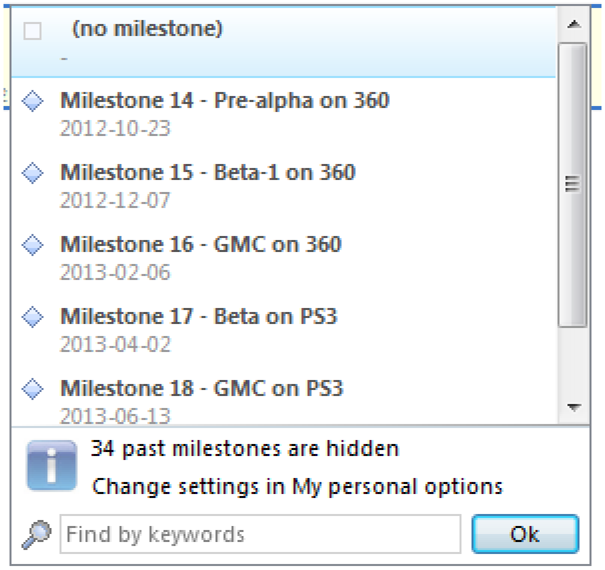
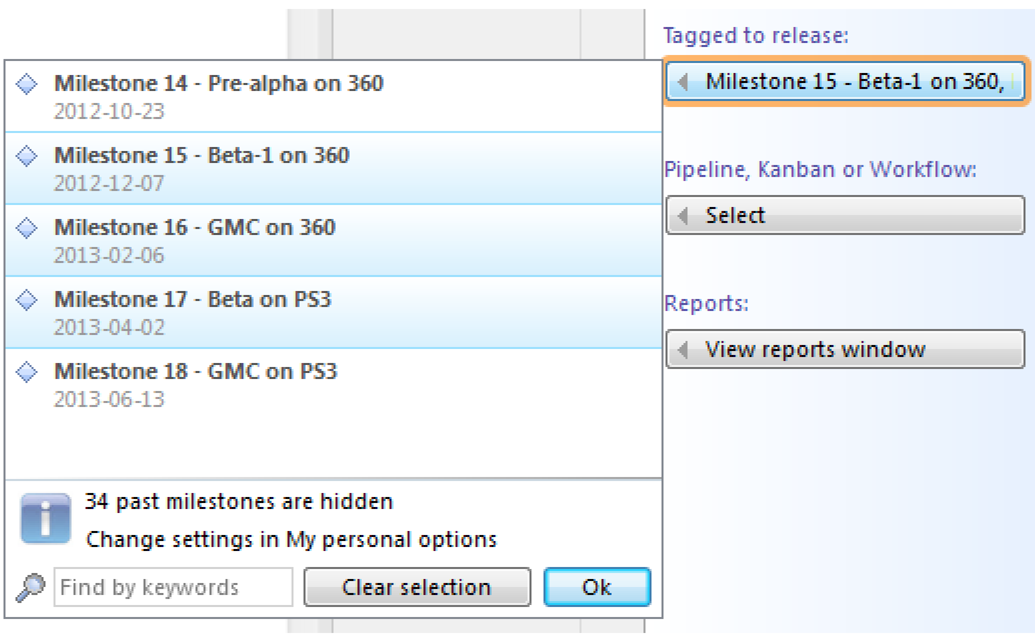
Hansoft provides functionality for tagging tasks and items to milestones/releases. Right-click on an activity and select Tag to milestone, selecting a desired milestone. You can also link tasks to the nearest milestone in terms of time (end date of tasks compared to the due date of milestone) and to multiple milestones:



Tag to multiple milestones/releases double click the Milestone tag column and select the milestones to tag to:



It is easy to view which tasks are tagged to a specific milestone by opening the [Find window](#) and selecting a milestone/release from the drop down list. This is an excellent way to compile a milestone status report:



Use shift or control to select multiple milestones/releases.

Customise project columns

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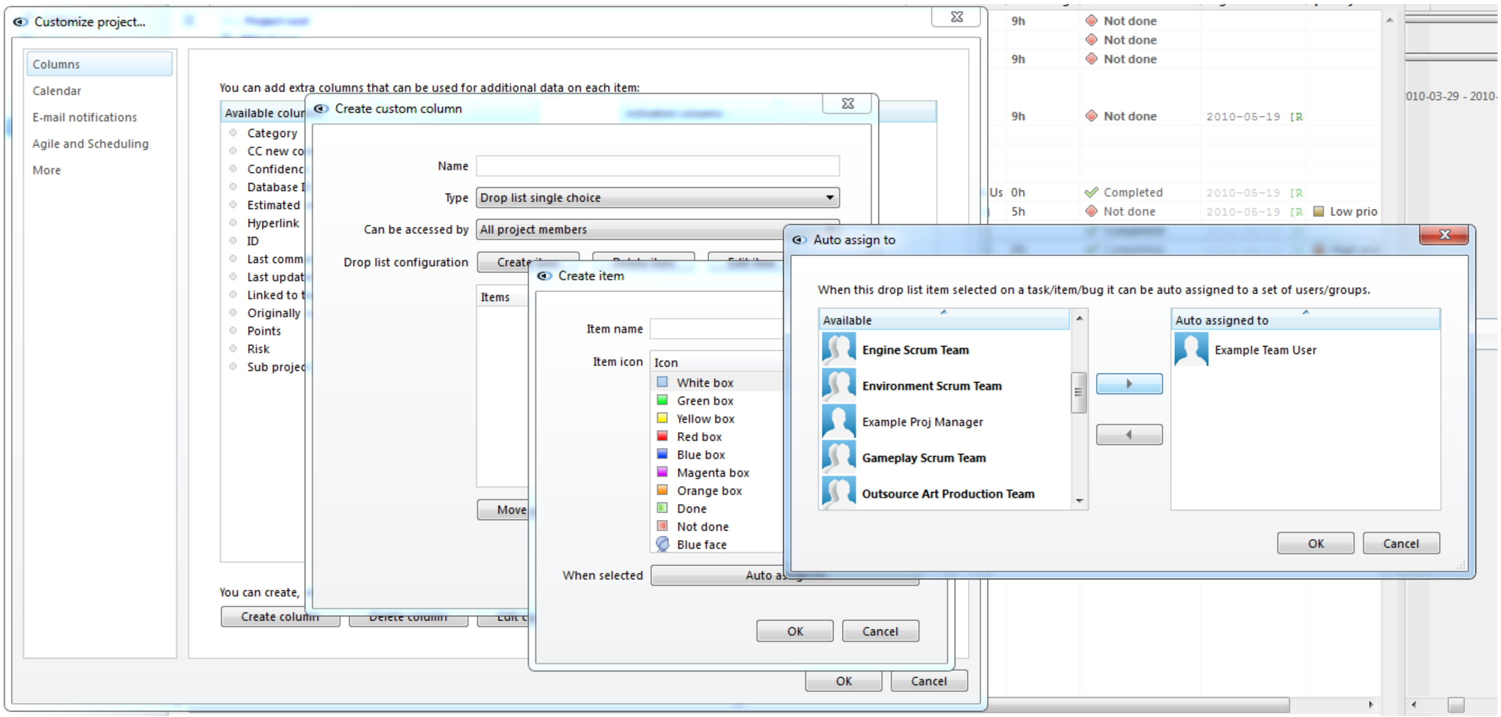
You can customise extra project columns for each project (and backlog) in Hansoft. Hansoft also comes with a variety of pre-created columns that easily can be activated.

Pre-created columns

- Complexity points (often used in agile projects)
- Confidence (often used in agile projects)
- Item status (often used in agile projects)
- Risk (often used in agile projects)
- Estimated ideal days (often used in the backlog in agile projects)
- Hyperlink (often used to integrate with SCM and asset management systems)
- Priority (often used in agile projects)
- Release tag (often used in the backlog in agile projects)
- Sub project path (sub project path shown in a separate column as opposed to before item name)
- Custom columns types
- Text (plain single text line)
- Multiline text (edited in activity details window, in the same way as comments or user stories)
- Hyperlink (for external links)
- Drop list (for categories or other like "asset type" or "sign off")
- Number (1,2,3, will be summarized by top level items)
- Number with decimals (1.0, 2.0, will be summarized by top level items)
- Date (2008-05-16, select any date)

Special functionality in drop list item type

You can auto assign an task, item or bug to someone dependent on the selected drop list items (this can be used to assign a task, item or bug dependent on classification for example):



Sub project/item path

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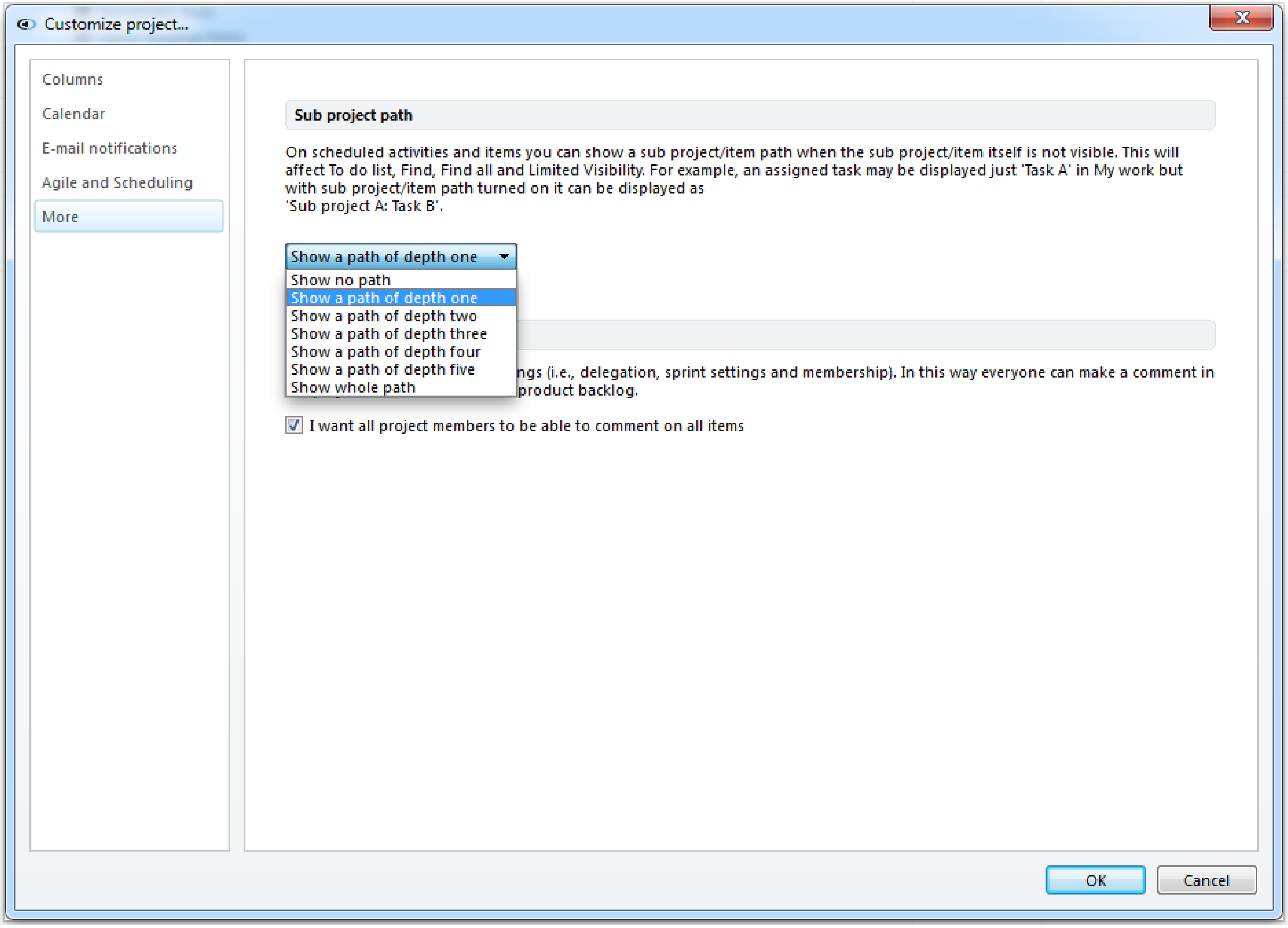
It is important for all project members and managers to see the context of a task when it is not displayed in full within in the project view.

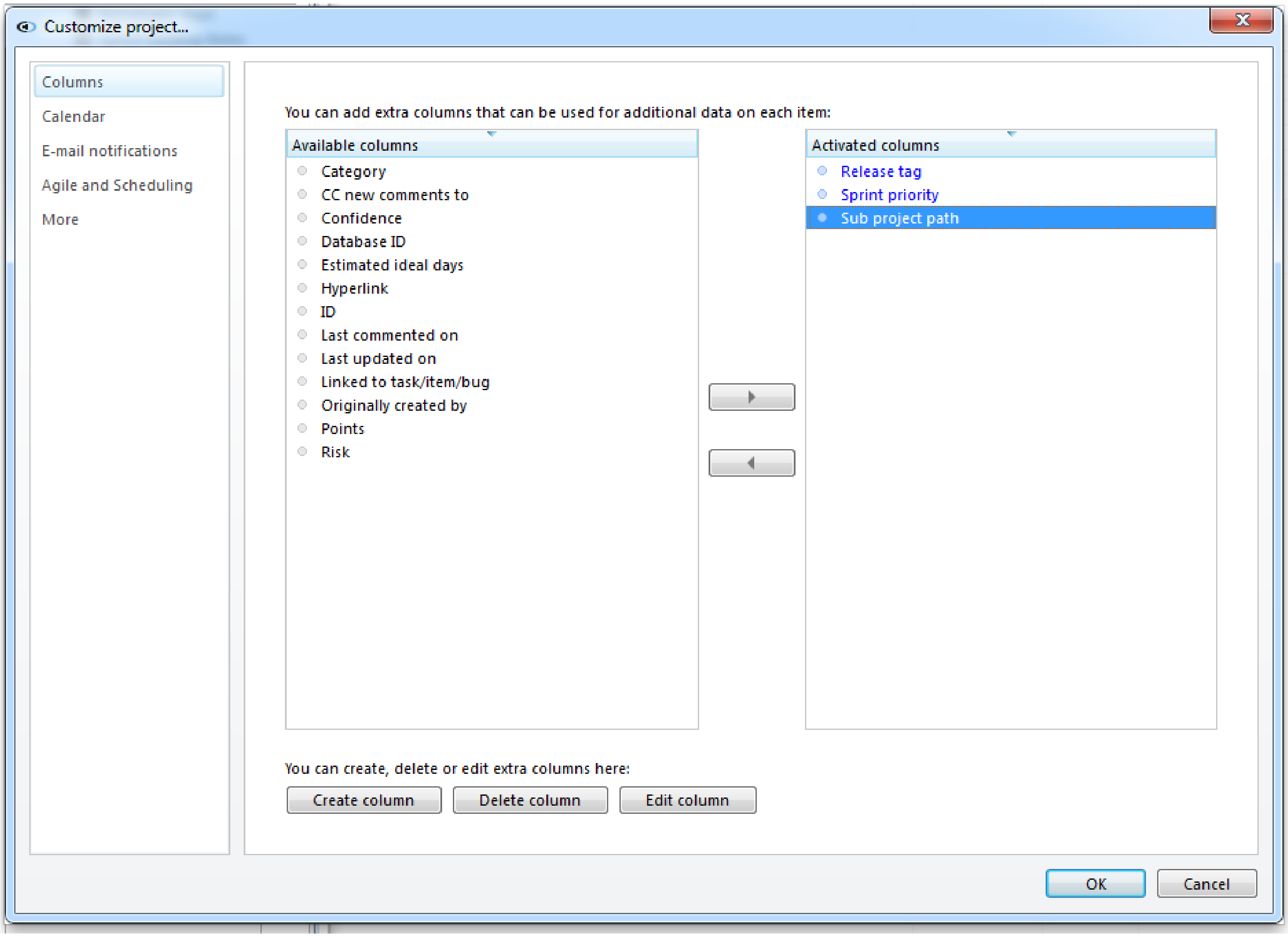
Hansoft has a solution to this called "sub project/item path". Basically, this means that tasks will be displayed as "Sub project A: Task B" instead of just "Task B" whenever Sub Project A is not visible. This is normally the case in the To do list, Find, Portfolio find and Limited Visibility.

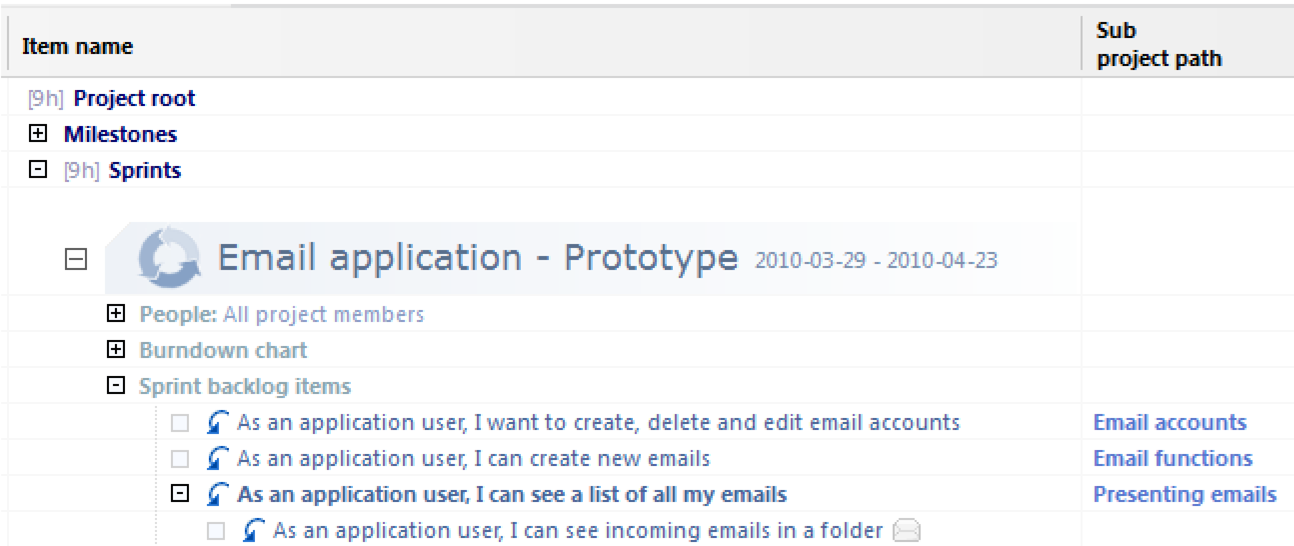
If you wish to set a custom setting on the path depth, click More >> Customise project, and finally More and Sub project/item path".



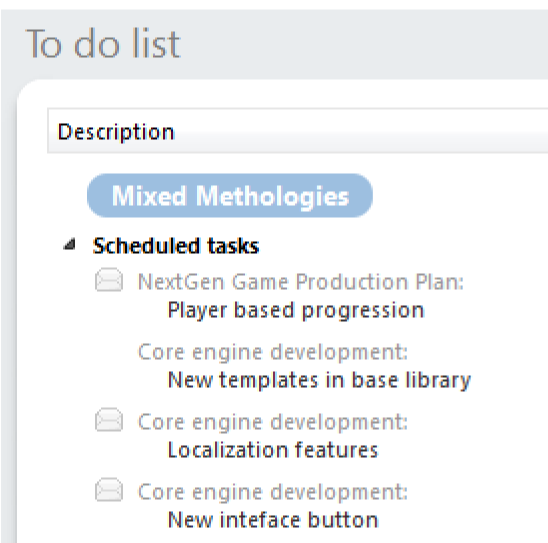
If you have a path of depth two and tasks and backlog items, they will be displayed like this in...

Sub project path can be shown in a separate column (as opposed to before Item name). [Activate the pre created column "Sub project path"](#):

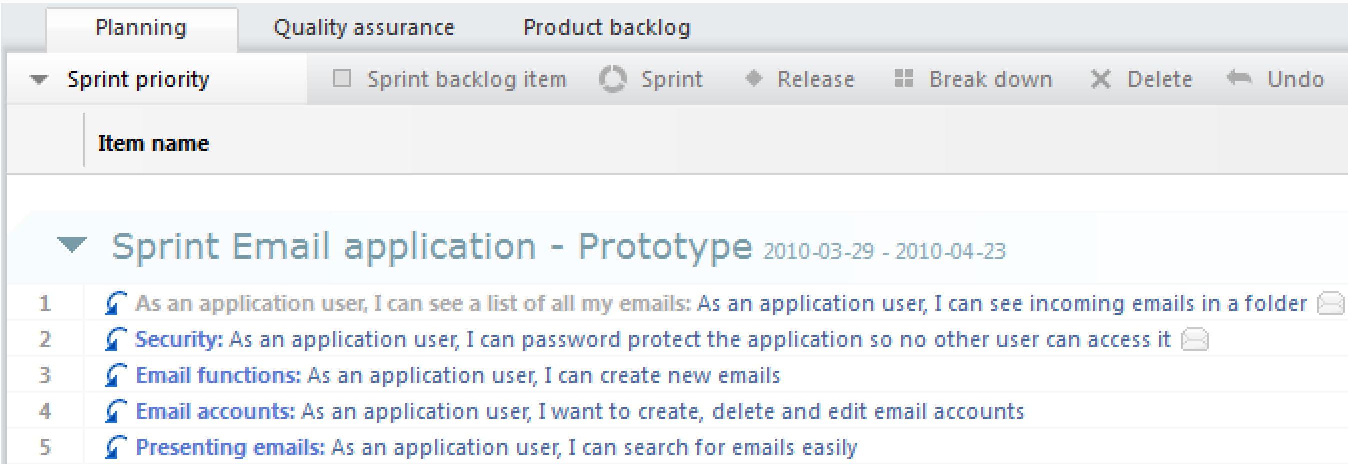

Customize project...
Columns
Calendar
E-mail notifications
Agile and Scheduling
More
You can add extra columns that can be used for additional data on each item:
Available columns
Category
CC new comments to
Confidence
Database ID
Estimated ideal days
Hyperlink
ID
Last commented on
Last updated on
Linked to task/item/bug
Originally created by
Points
Risk
Activated columns
Release tag
Sprint priority
Sub project path
You can create, delete or edit extra columns here:
Create column
Delete column
Edit column
OK
Cancel



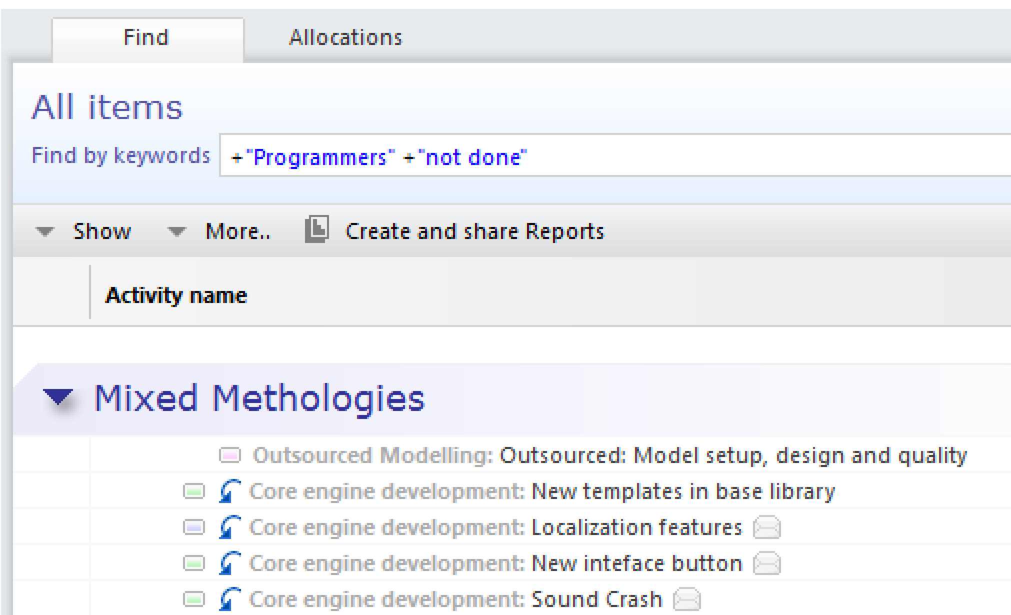
To do (path seen in gray):



Prioritised (path seen in blue and grey):



Portfolio find (path seen in grey):



Delegation and limited visibillity

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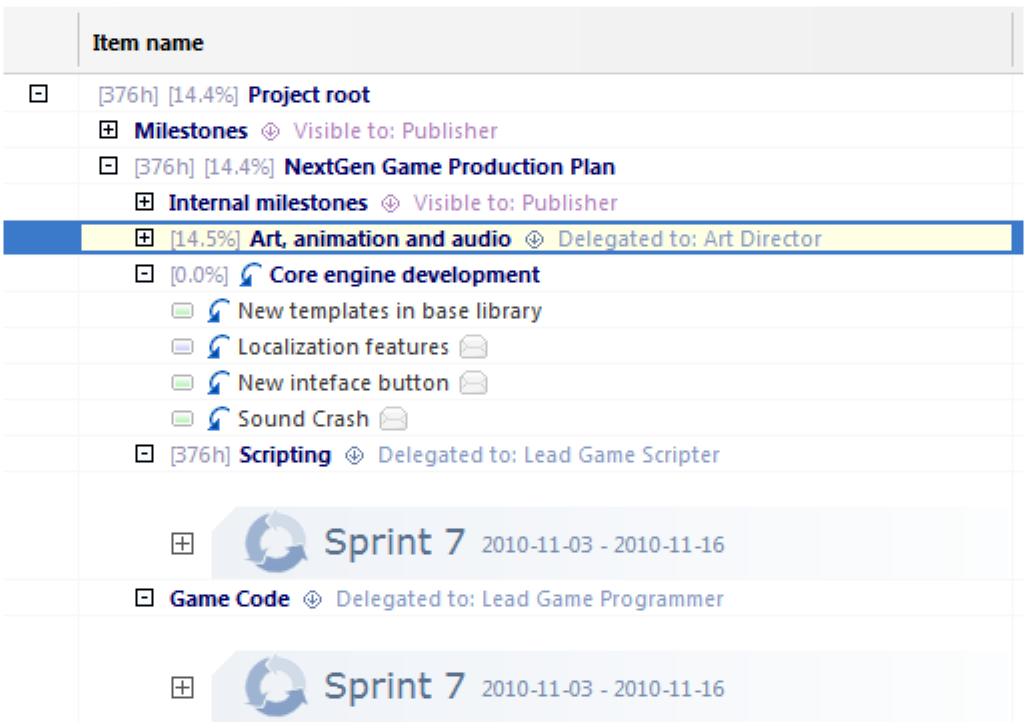
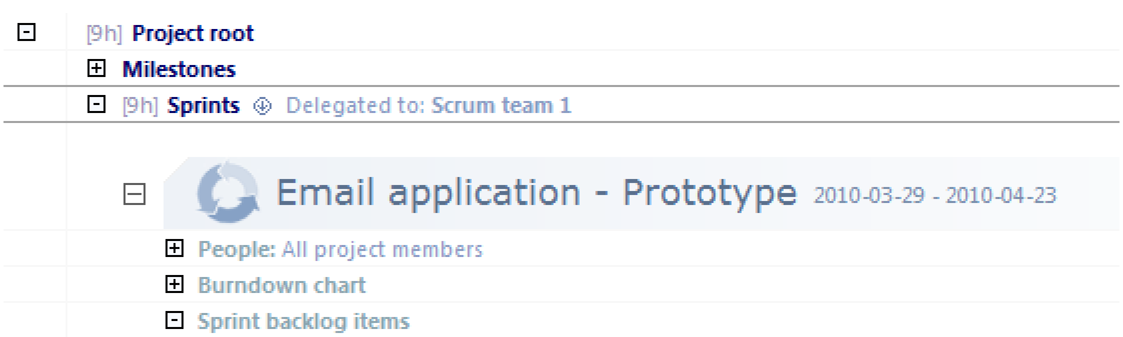
Delegation and limited visibility on sub-project/items are vital components in structuring and organizing projects and how each team member fits in within the project schedule, sprints and backlogs.

Delegation

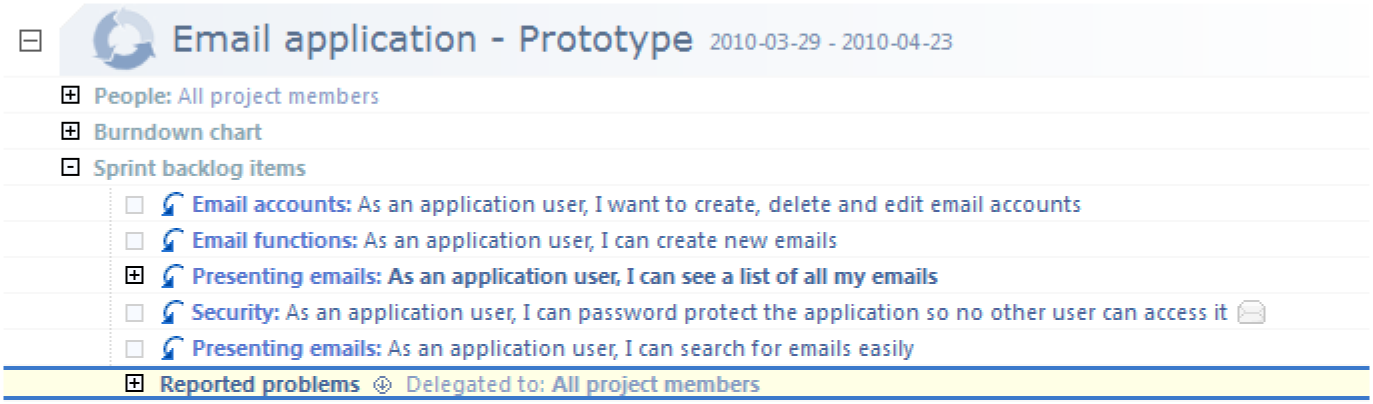
If you delegate a sub-project, a task item or backlog item to a user (or a group of users) they have the ability to create, delete and change everything below the sub-project. Tasks can be broken down, added and removed. A main project manager can, in this way, keep the control over the whole project by letting sub-project managers take control over some parts. In larger projects, this is often necessary to make the project and its organization effective. Delegating is done by right-clicking on an item or sub-project and selecting Delegate to...



Delegating a part of a scheduling project



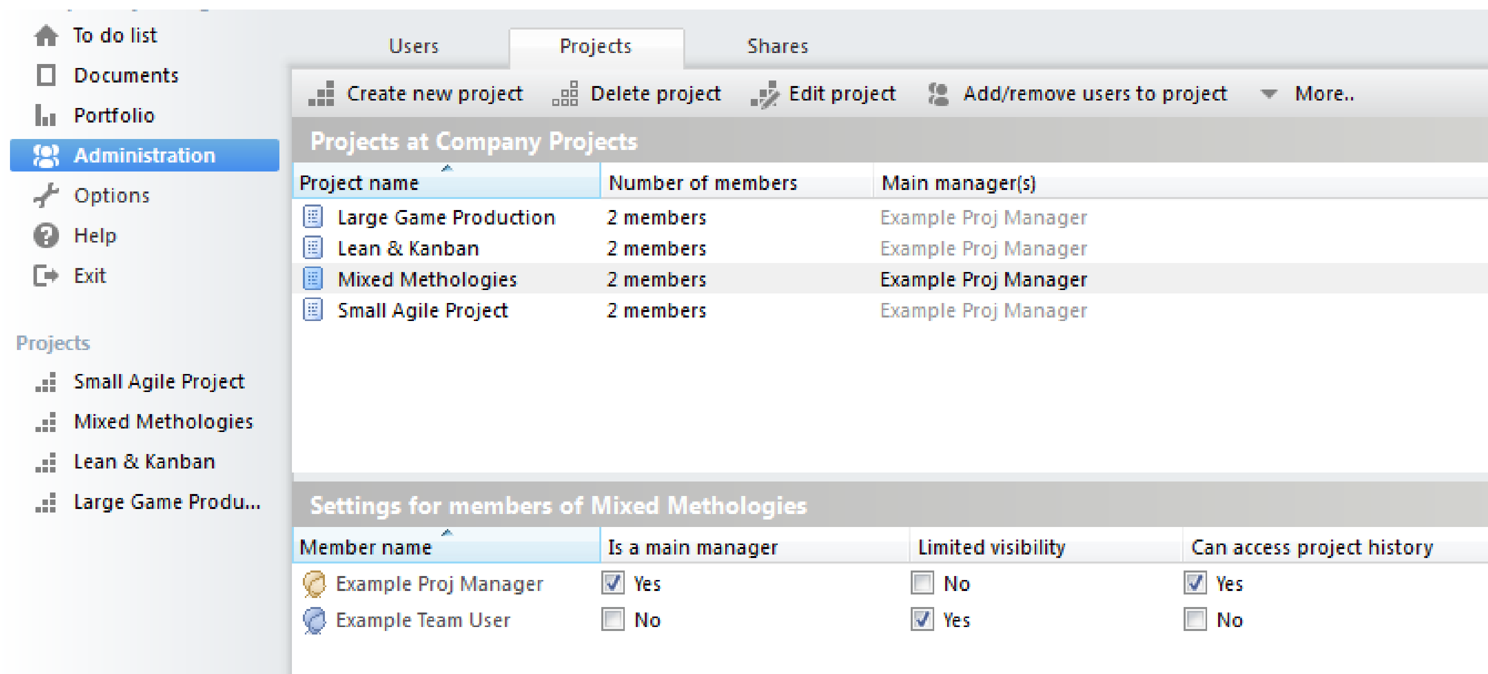
Delegation to a whole scrum team in agile

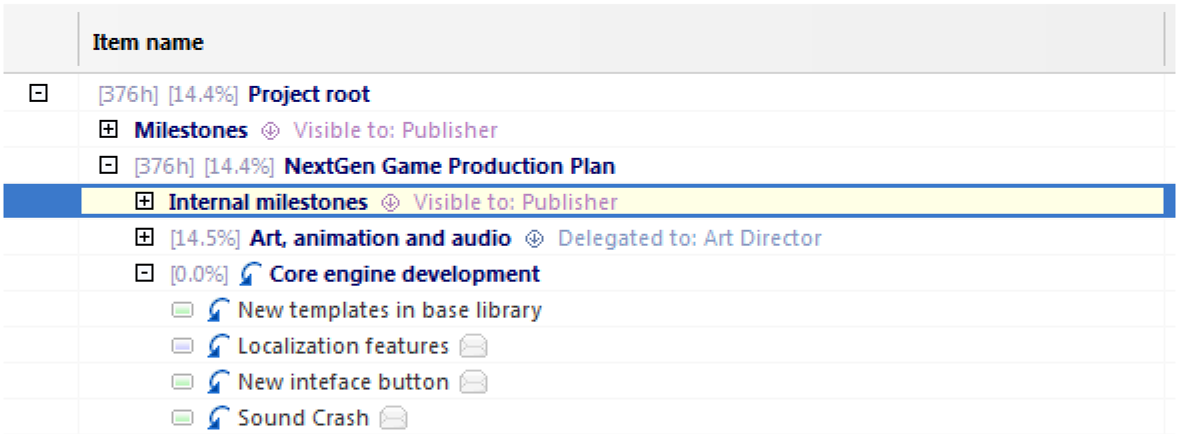


Delegation example of the backlog in an agile project

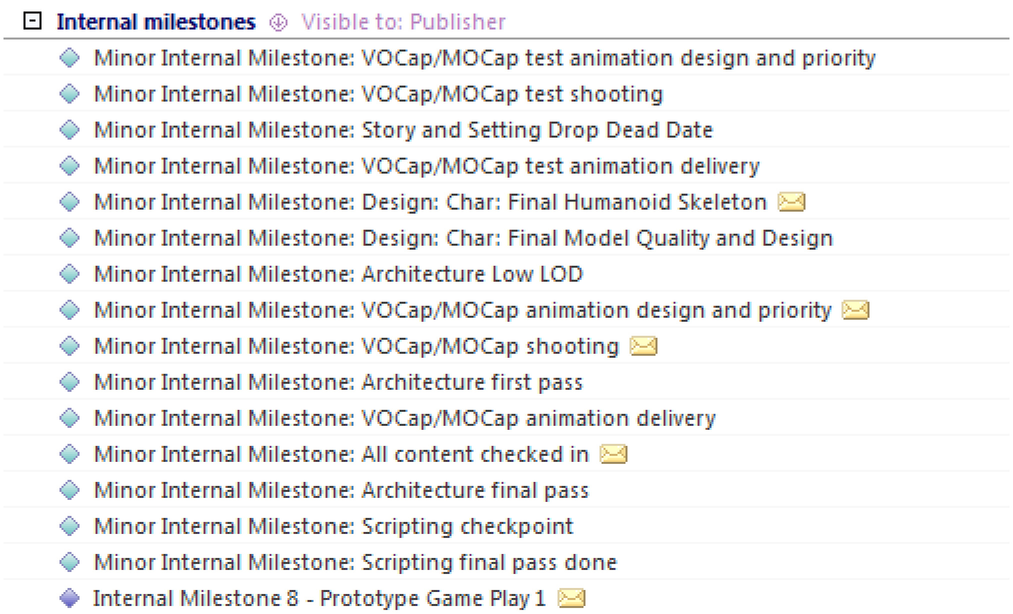
Limited visibility

Limited visibility is vital if, for example, you want to connect outsourcing partners or other external project partners and let them see only a part of the project. First you have to set the "Limited visibility" flag under "Administration", "Projects" and "Settings for members of..." for the user that limited visibility should affect. Right click on a sub-project or backlog item and click on "Visible to.."





Setting Limited visibility on internal milestones



How Limited visibility will affect the Publisher

Calendar and working hours

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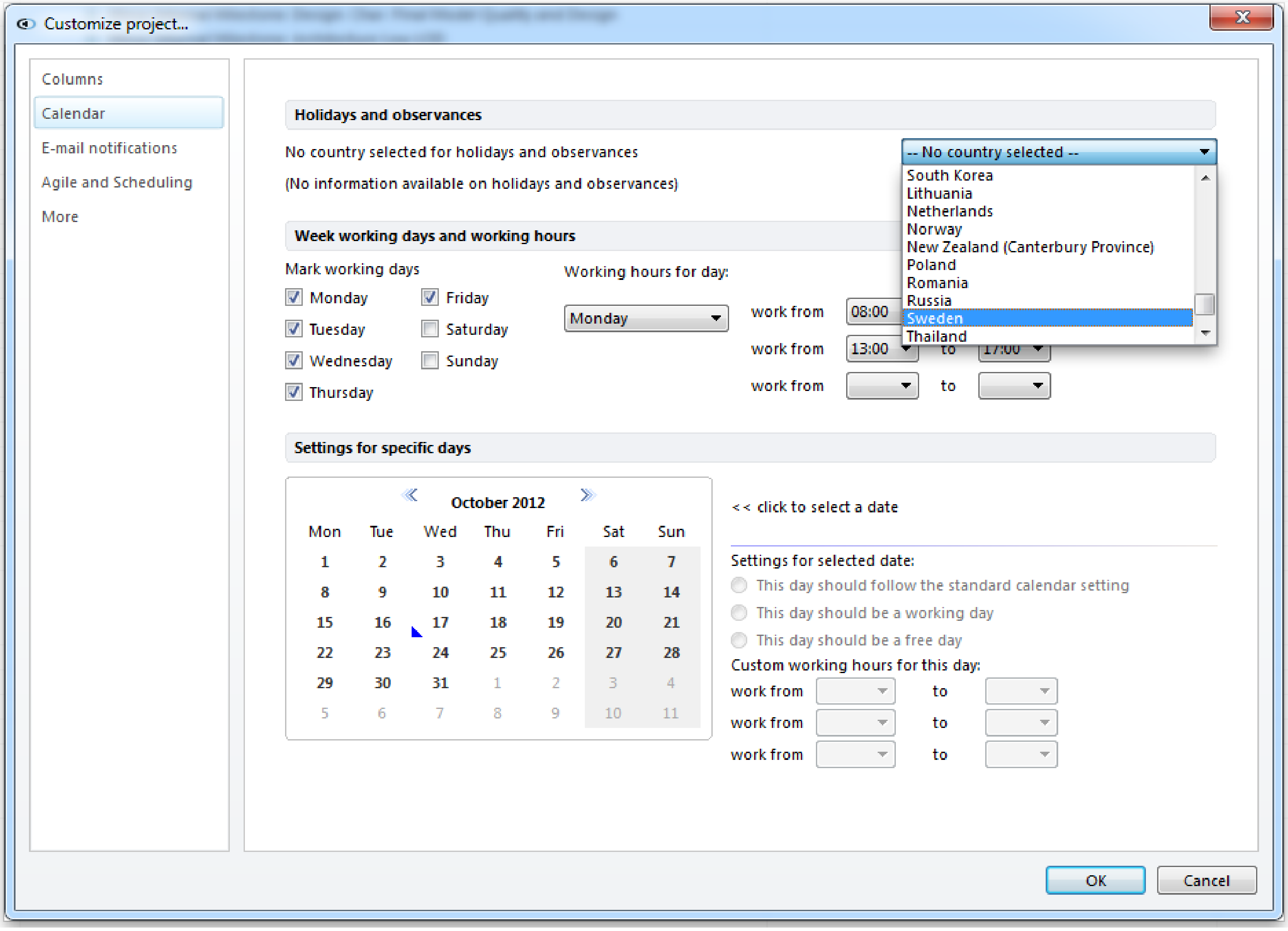
One important aspect when making the project plan is to set the working days and working hours. That is done in the Calendar & working hours window.

Opening the window

Choose "Customize project..." in the "More..." menu, and then choose "Calendar" to the left.



The window is split up in three parts: Holidays and observances, Week working days and working hours and Settings for specific days.

In the Holidays and observances part of the window, you select the country which most closely matches your local holidays and observances. Holidays of that country will be marked red in the calendar, and will also be shown in the To do list, and in Project Overview.

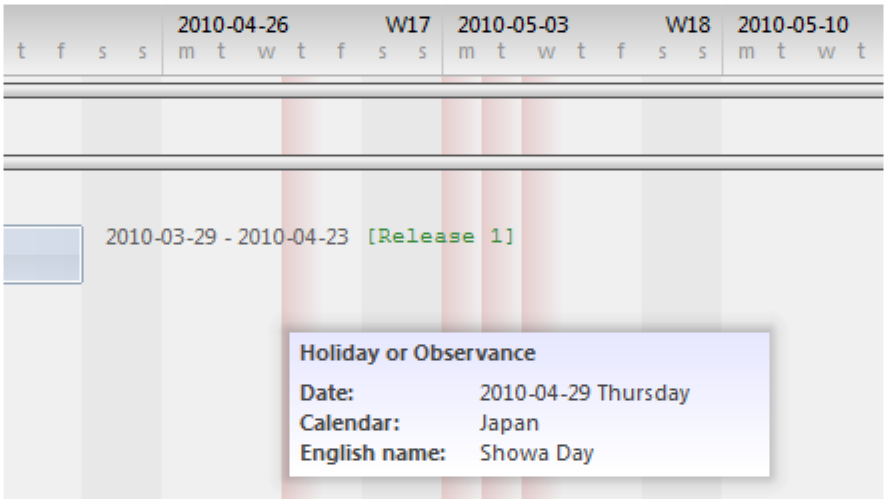
In the Week working days and working hours you set the week's general working days as well as the general working hours for the week. Free days are marked grey in the Calendar and are also shown in the To do list and in Portfolio find.

In Settings for specific days you determine any special settings for a day that should overrule the general settings

made in the Week working days and working hours part of the window. The days you have changed will be marked green for a free day/working day change, and red for a change in working hours (in this calendar window only).

Note: The calendar setting applies to the whole project.

An example using the calendar settings for the Japan within a project (holidays are denoted by red bars):



Working hours

Changing working hours in a project changes the allocation (in hours, not percentage) of the users that have assigned tasks in that project.

If we have set a six-hour working day, and allocate the user to a capacity of 50% in this project, this would indicate that the user has to work three hours a day on this task. An eight-hour working day with a 50% allocation would indicate four hours of work on this task per day.

Out of office/vacation/holiday planning and part time work

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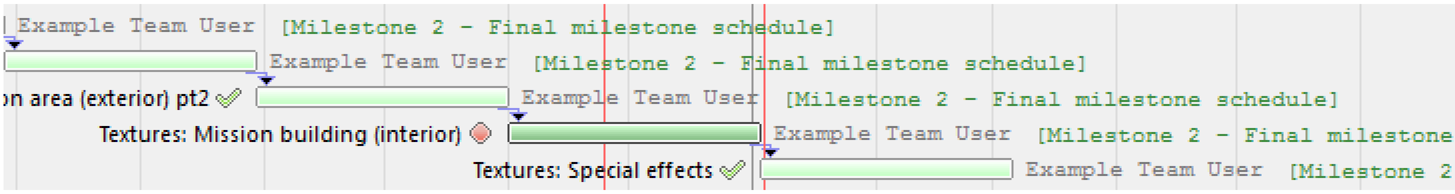
Hansoft has powerful features for out of office/vacation/holiday planning and part time work individual users that affect both scheduled and agile projects.

One of the most important aspects of our out of office planning and part time work is that it is global (affecting all projects) once you set it up in one project.

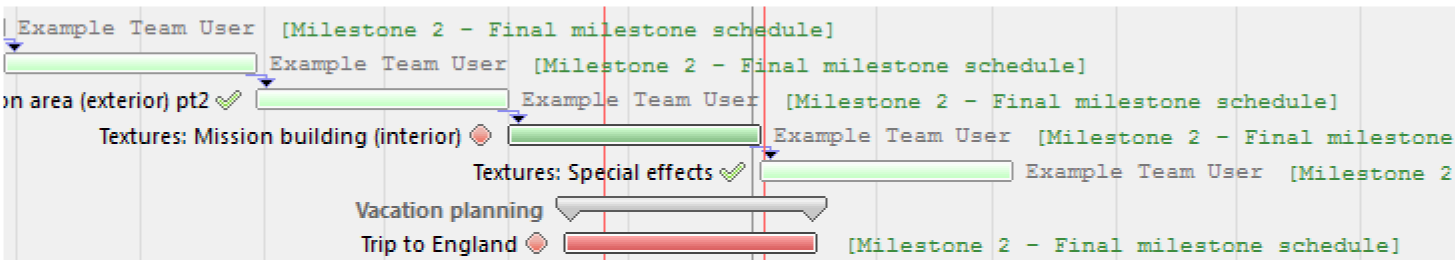
Be careful when changing out of office planning! If handled incorrectly, it can destroy schedules and dependencies because of its auto-adjustment functionality.

Out of office planning

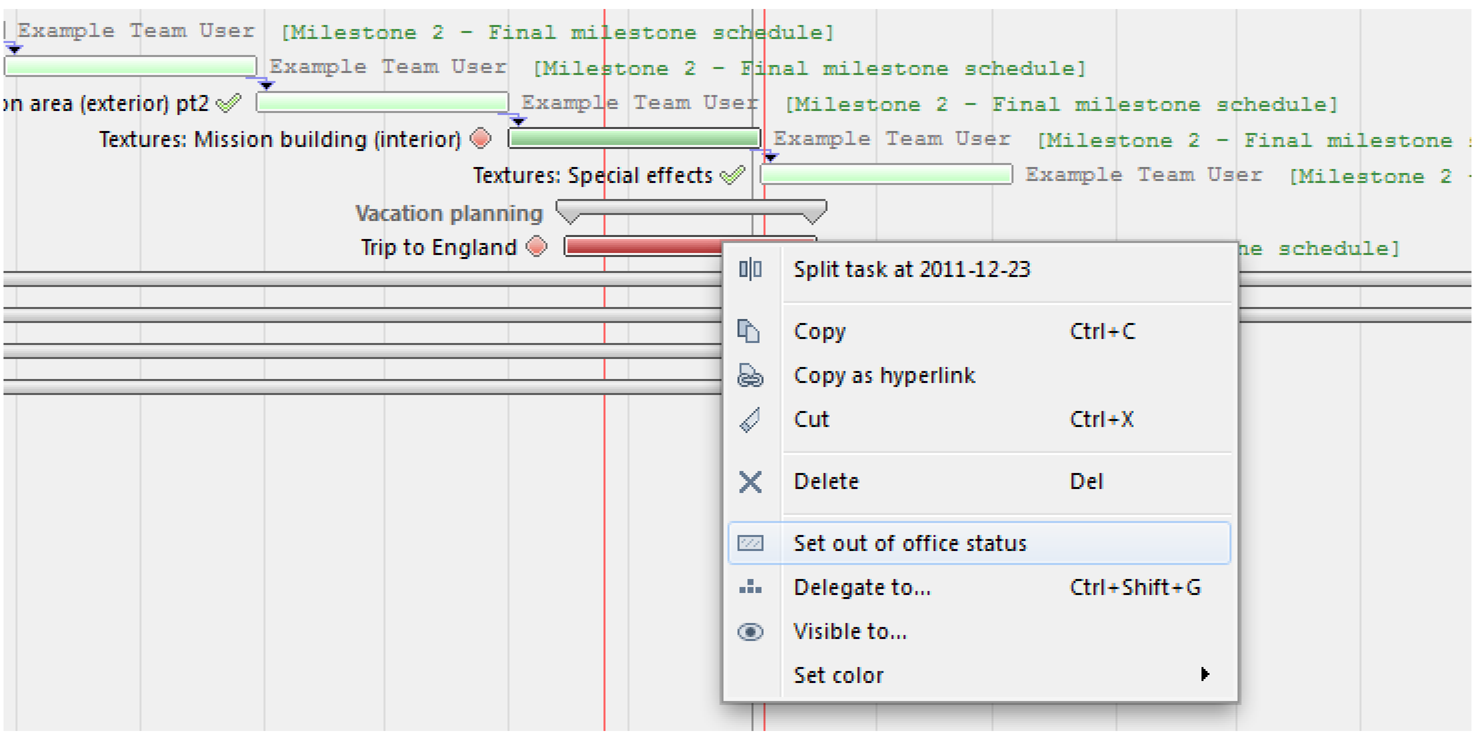
We have a schedule made for "Example Team User" that looks like this:



We decide that "Example Team User" should go to England (red bar) and this creates a normal planned task for when he is gone:

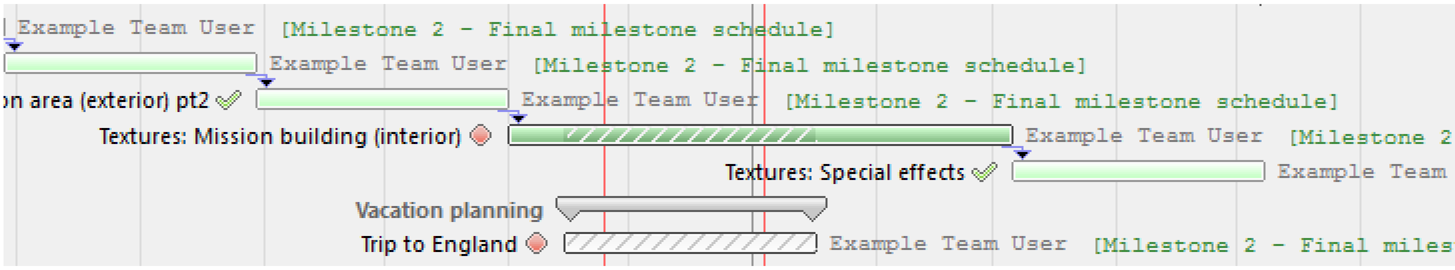


We right click on "Trip to England" and choose "Set out of office status on task(s)":

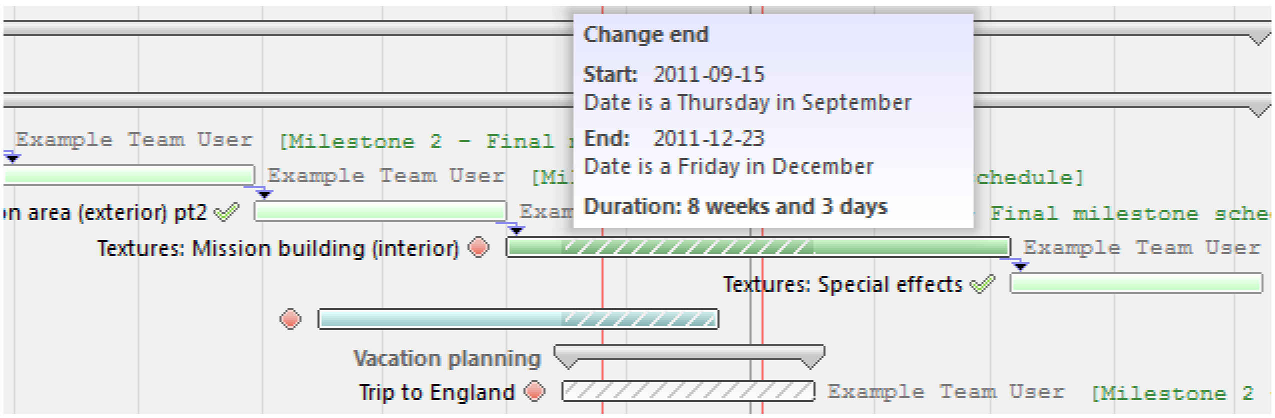


"Trip to England" is now an out of office task (visualised by thick grey diagonal lines). The task is also assigned to

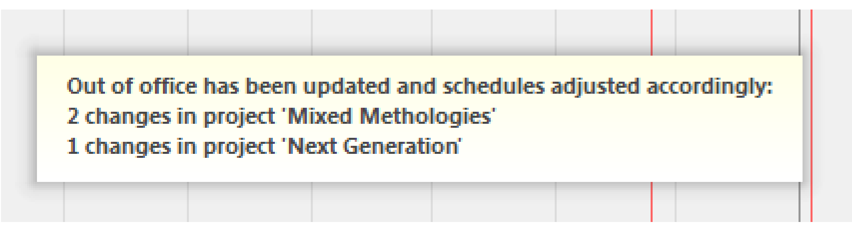
Example Team User. The schedule has now been automatically adjusted and the task "Code: Functions" has been extended in time without adding extra working days:



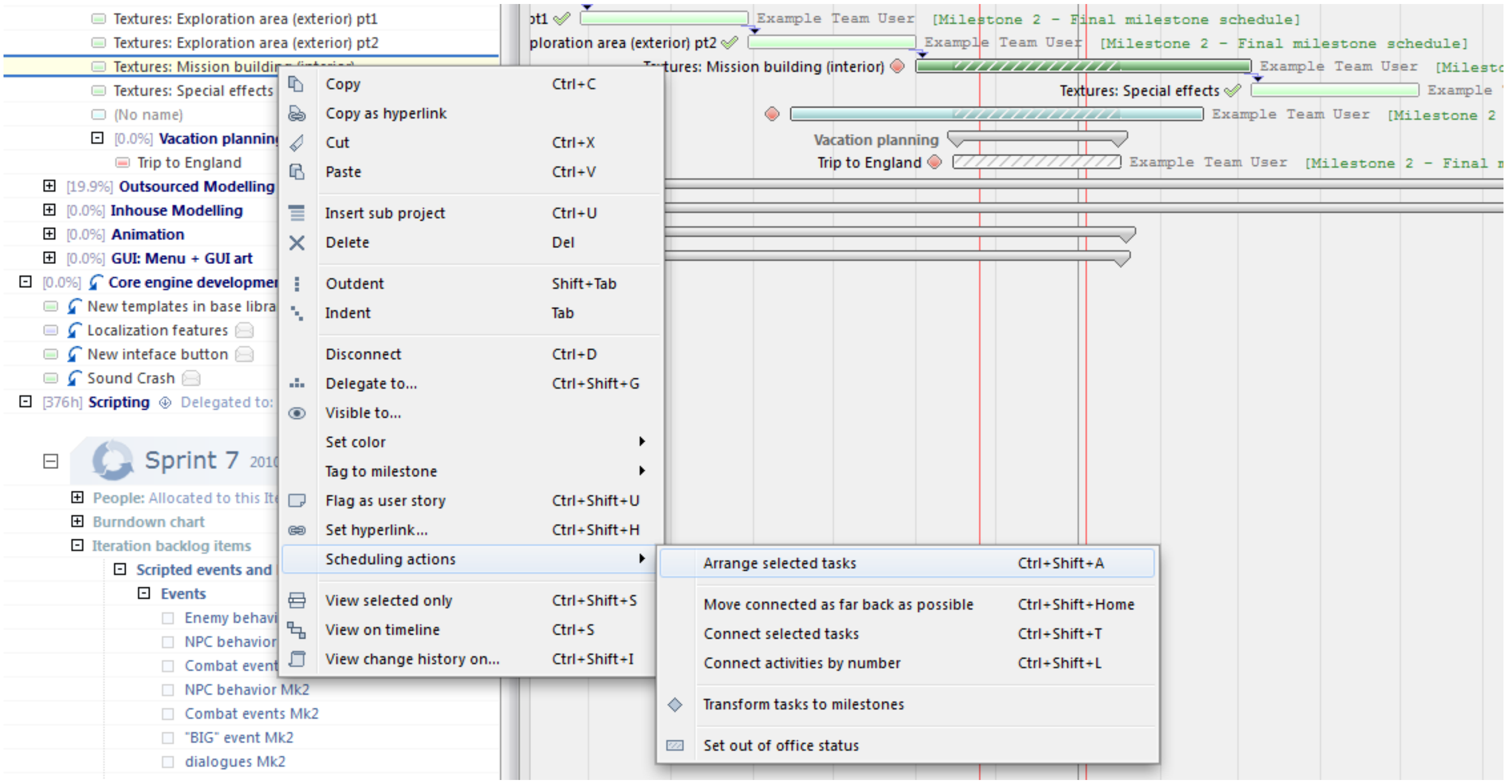
Out of office task "Trip to England" is now global (affecting all projects). Thus, when we create, drag, extend or change a user on a normal planned task, it will be directly affected by the out of office task:



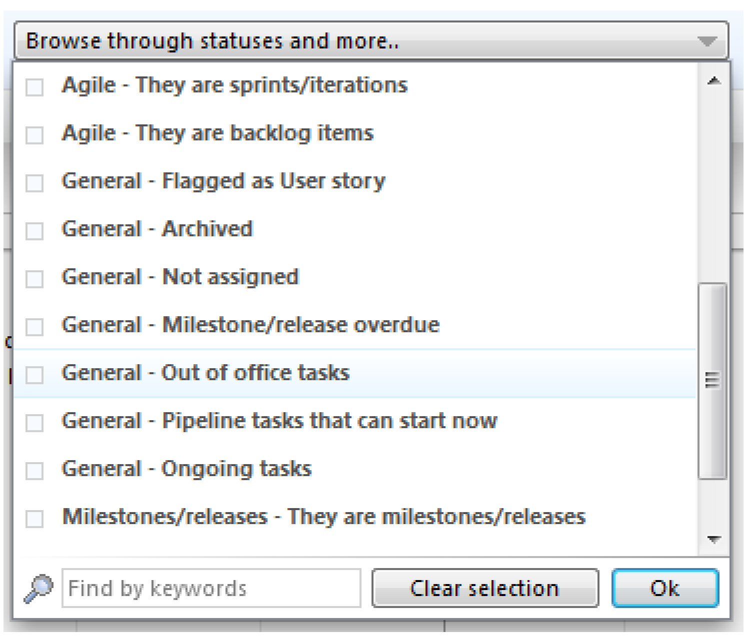
When updating out of office planning, please notice which projects that have been affected by the planning changes:



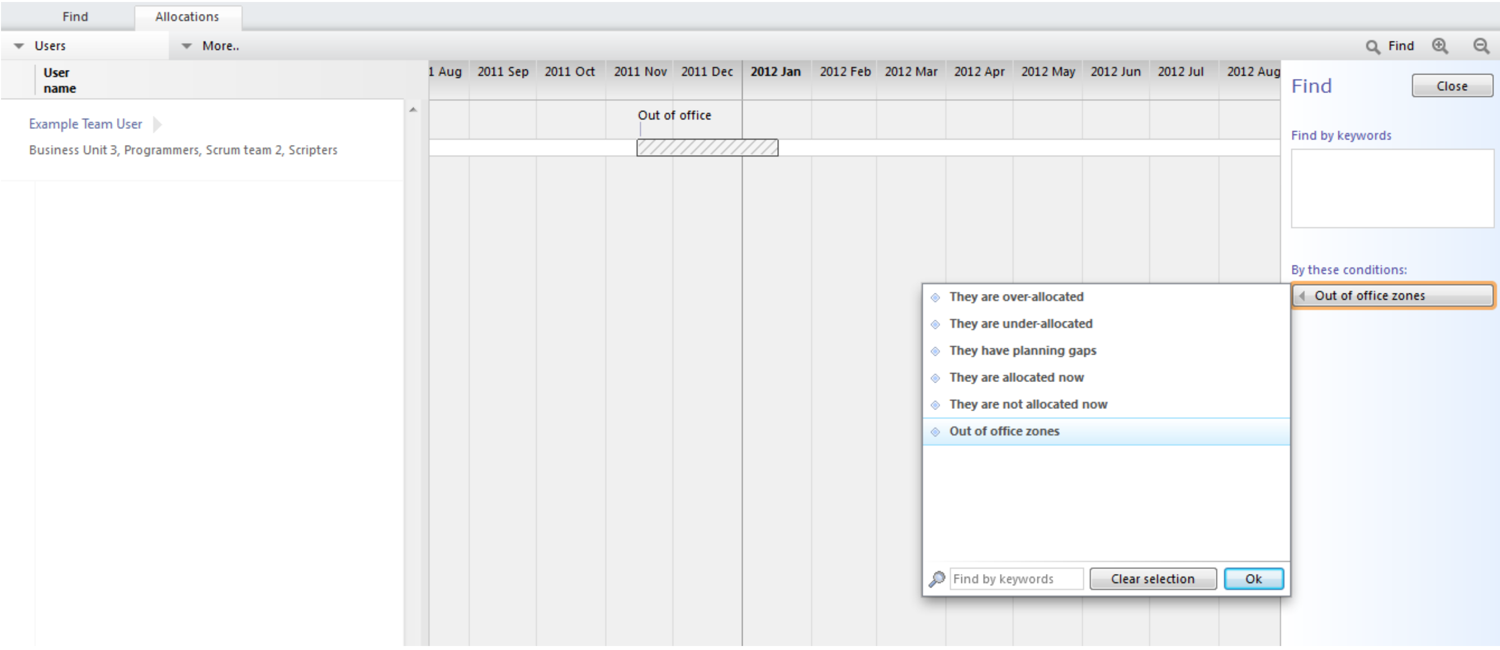
If you arrange tasks (Ctrl + Shift + A, or Cmd + Shift + A), they will be adjusted in accordance with out of office planning.



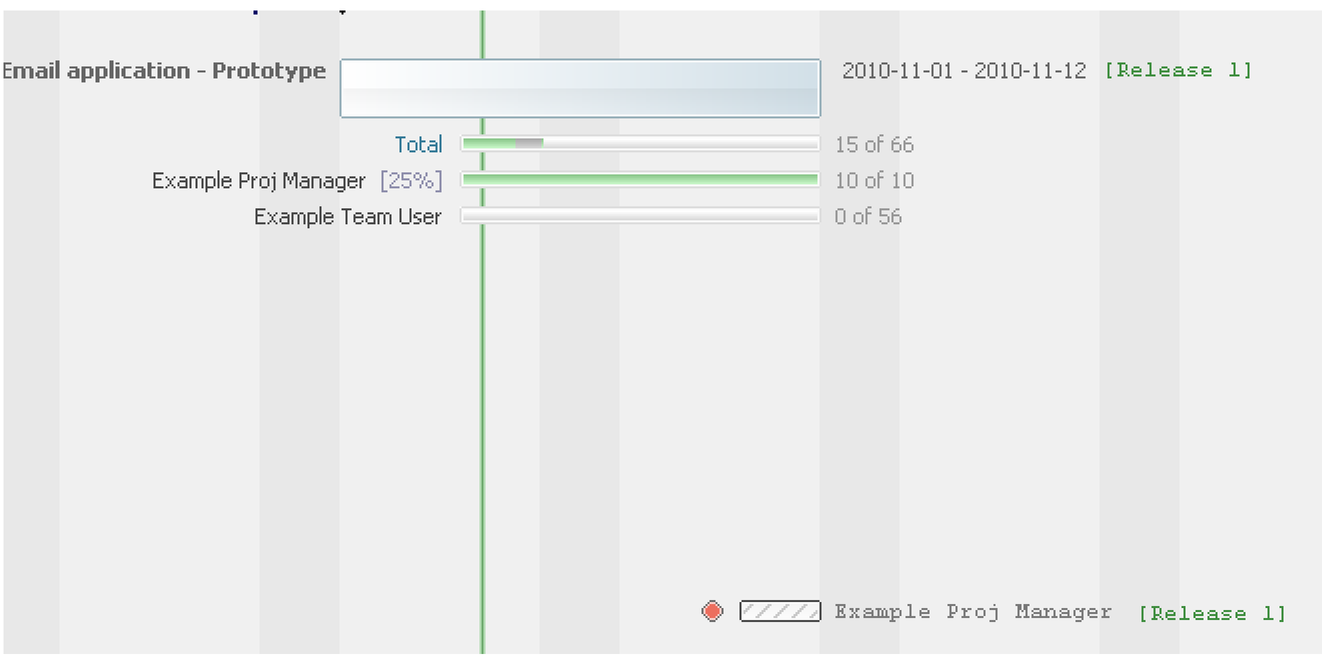
All out of office planning in all projects can be summarised in "Portfolio find", by choosing condition and "They are out of office tasks":



All out of office tasks are also visible in all Portfolio allocations views. You can choose to view only out of office zones by clicking on "They are out of office zones" in user find:

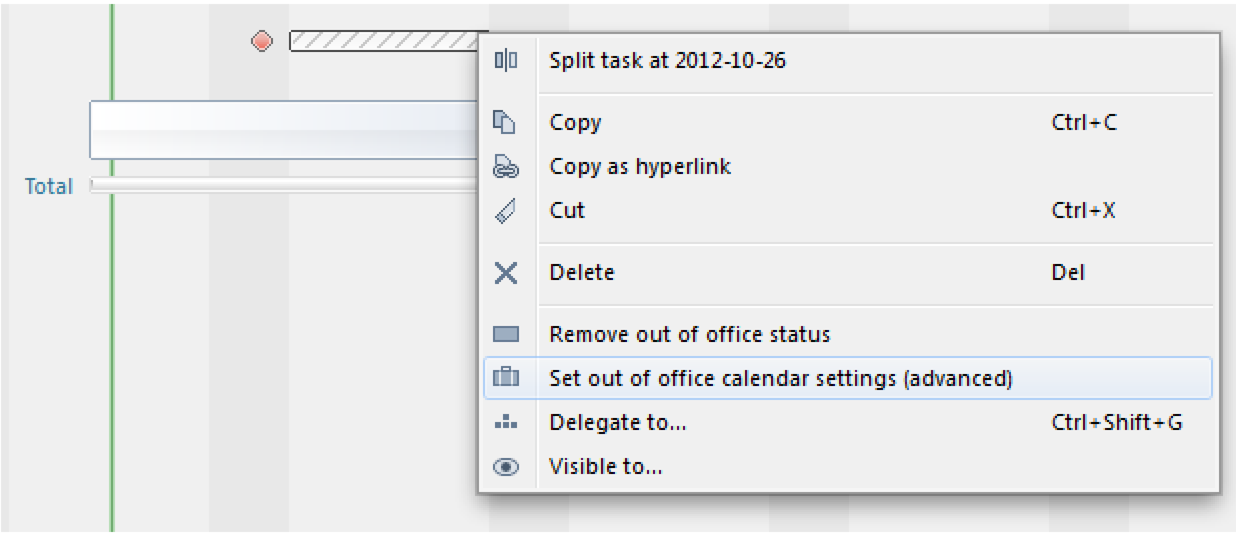


Out of office tasks affect sprints/iterations if they are "inside" them.

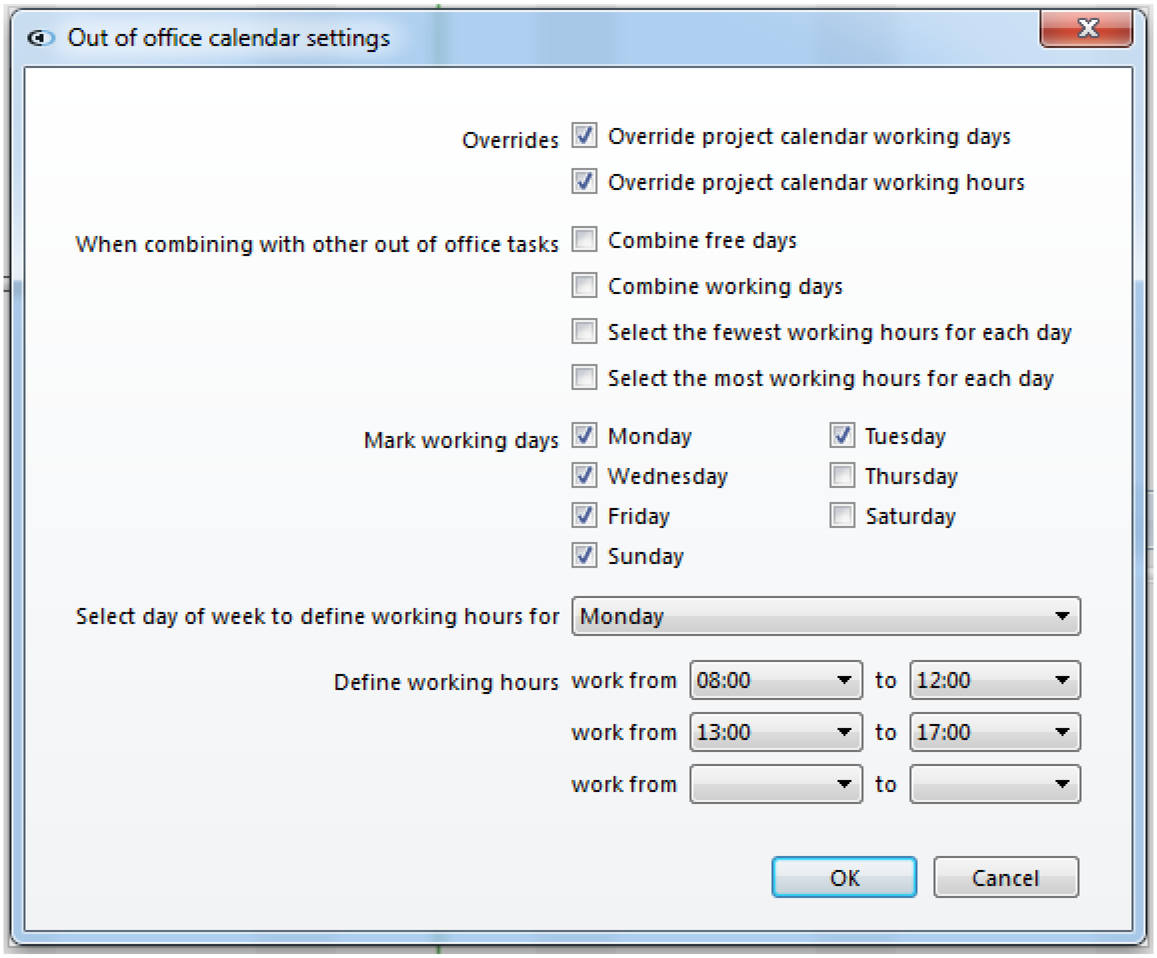


Part-time work

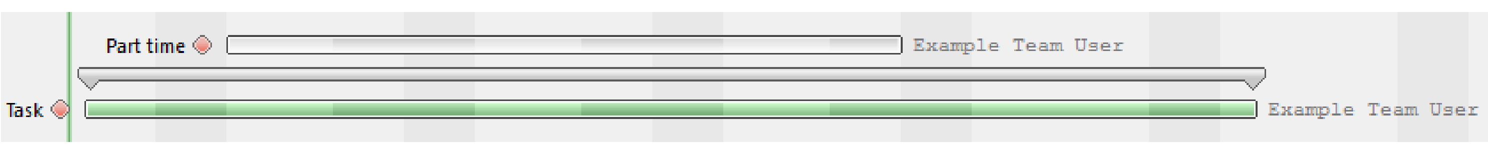
You can also create a period of time in which a user is working part time. Create an out of office task, right click and select "Set out of office calendar settings".



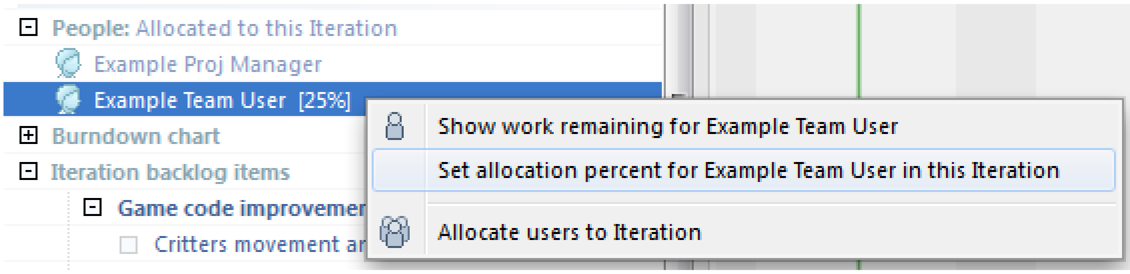
You can now transform this out of office task to a part time calendar for an individual user by overriding the project calendar. After this change, all schedules will auto-adjust to the new settings in the same way as out of office planning. Example:



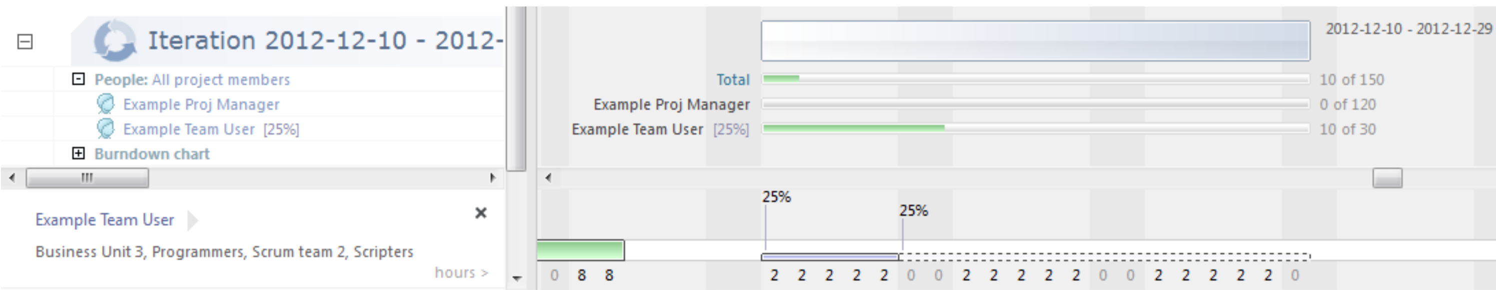
Here is an example of part time work for one user for three weeks. You can see how the out of office task is affecting the normal task by looking at the darker areas of the green task.



Another way to handle a part time working user in agile projects is to set the allocation percent for a user in a sprint:



"Example Team User" is now allocated to 25% in this sprint:



The activity details window

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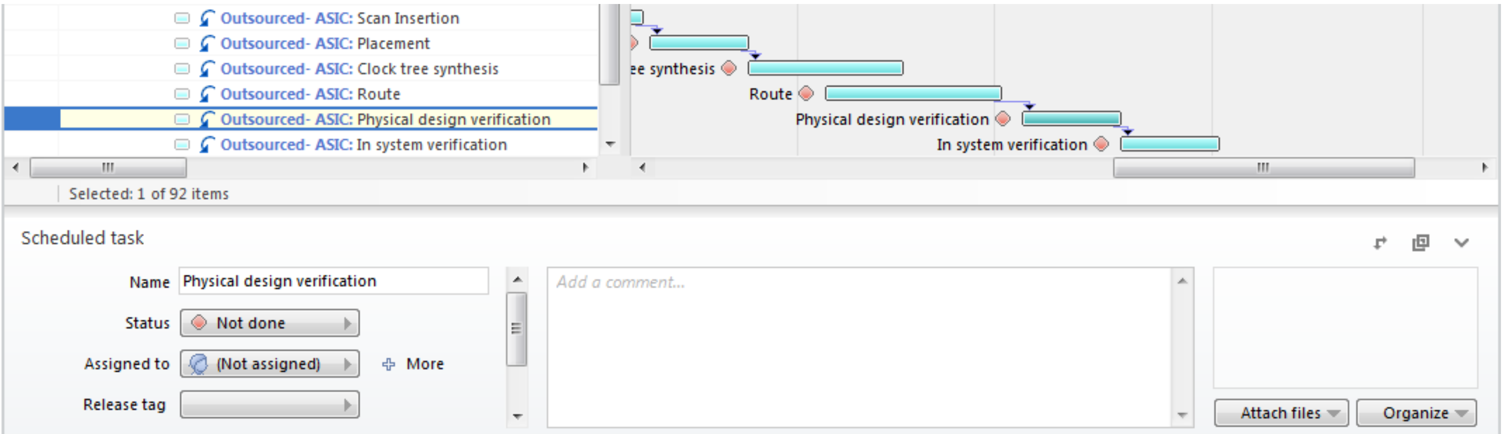
The activity details window is located below the activity list. It provides a quick and accessible way to edit the selected activities.

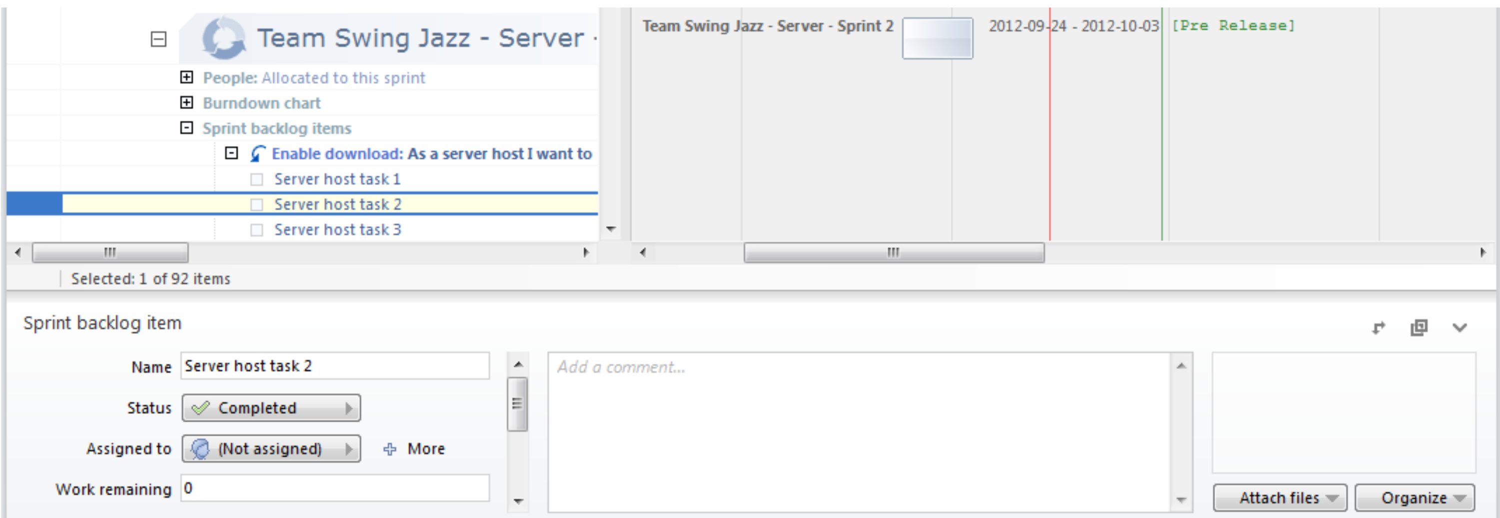
Please note that this window has a dynamic size and if you left click on the grey faded bar at the top of this window you can increase the size. As the size increases, more properties on the task/item will be visible. If the size is increased, as in the agile project example (see second picture in this chapter), you will see that you can directly manage attached files.

Also, please note that you can drag and drop files directly to this window.

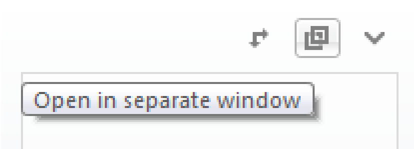
Activity details window in a task scheduling project:

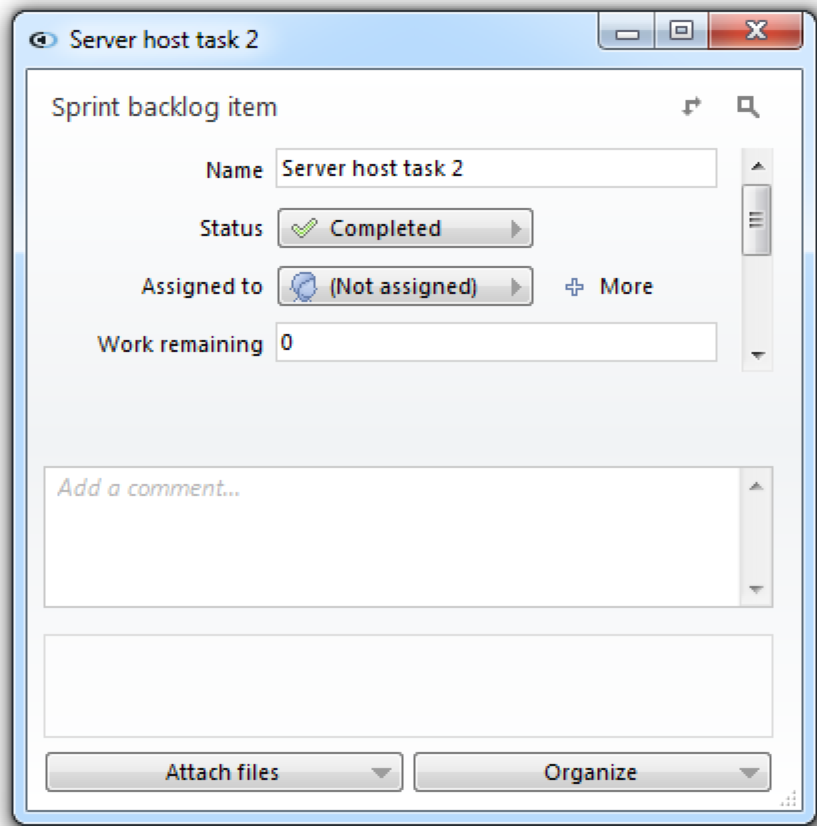


Activity details window in an agile project (with a sprint backlog item selected that has been flagged as a [user story](#)):



The activity details window can be opened in a separate window (click the detach icon). This allows people to work on multiple tasks at once:





Comments: Post comment on an item/task. Please note that you can use html tags such as <bold> and </bold> or <URL=www.hansoft.se>Hansoft</URL>.

All comments popup : Hansoft features a "forum style" comments history and chat system with embedded images. As an example, you, project managers, executives or outsourcing partners can reply, post new and edit comments on tasks.

Comments with images

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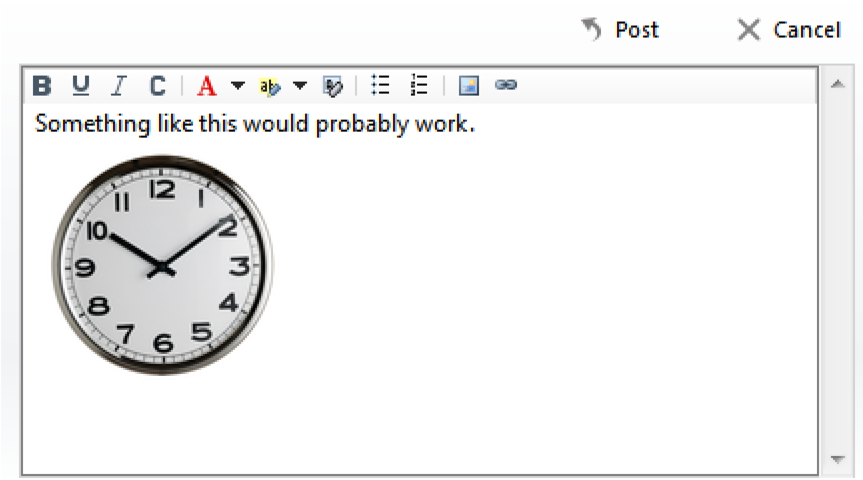
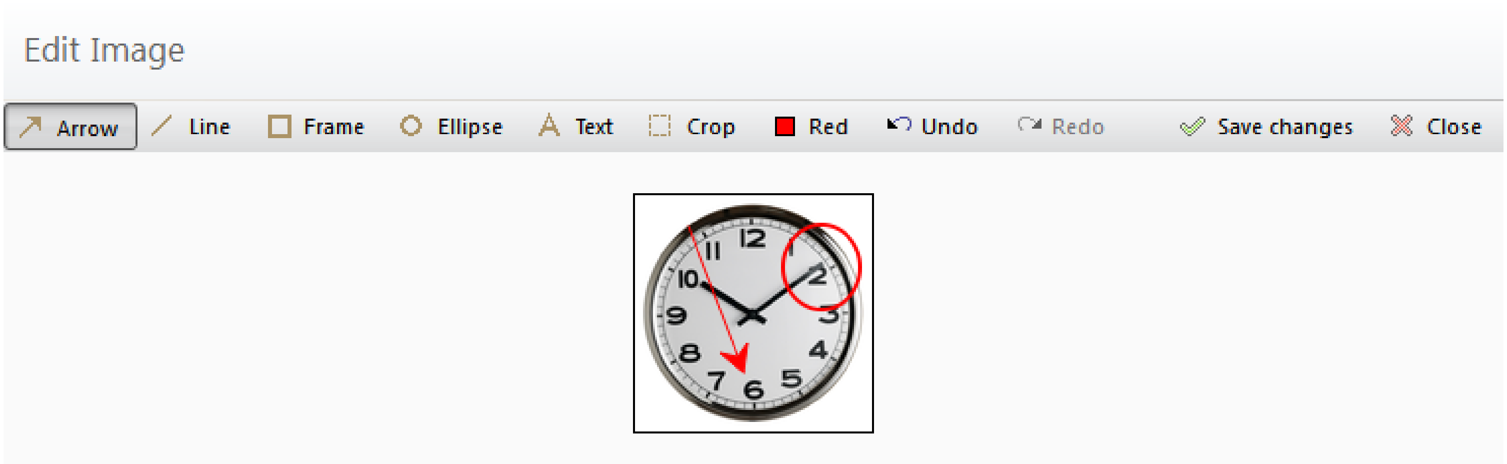
Hansoft features a comments system where you can embed and edit images. This useful when chatting about art assets, reporting bugs or discussing features.

Hansoft handles PNG, BMP, JPG and GIF files. Images can be inserted either by clicking the Insert image icon on the text field toolbar, or simply by pasting from the clipboard. You can also attach them from within Hansoft document system or by drag and drop from Windows.



An image recently pasted into a comments field

Hansoft also comes with an image editor, accessed by right-clicking the image and selecting Edit image. This is useful for highlighting or framing portions of an image relevant to the discussion.



The image editor

Printing and data importing/exporting

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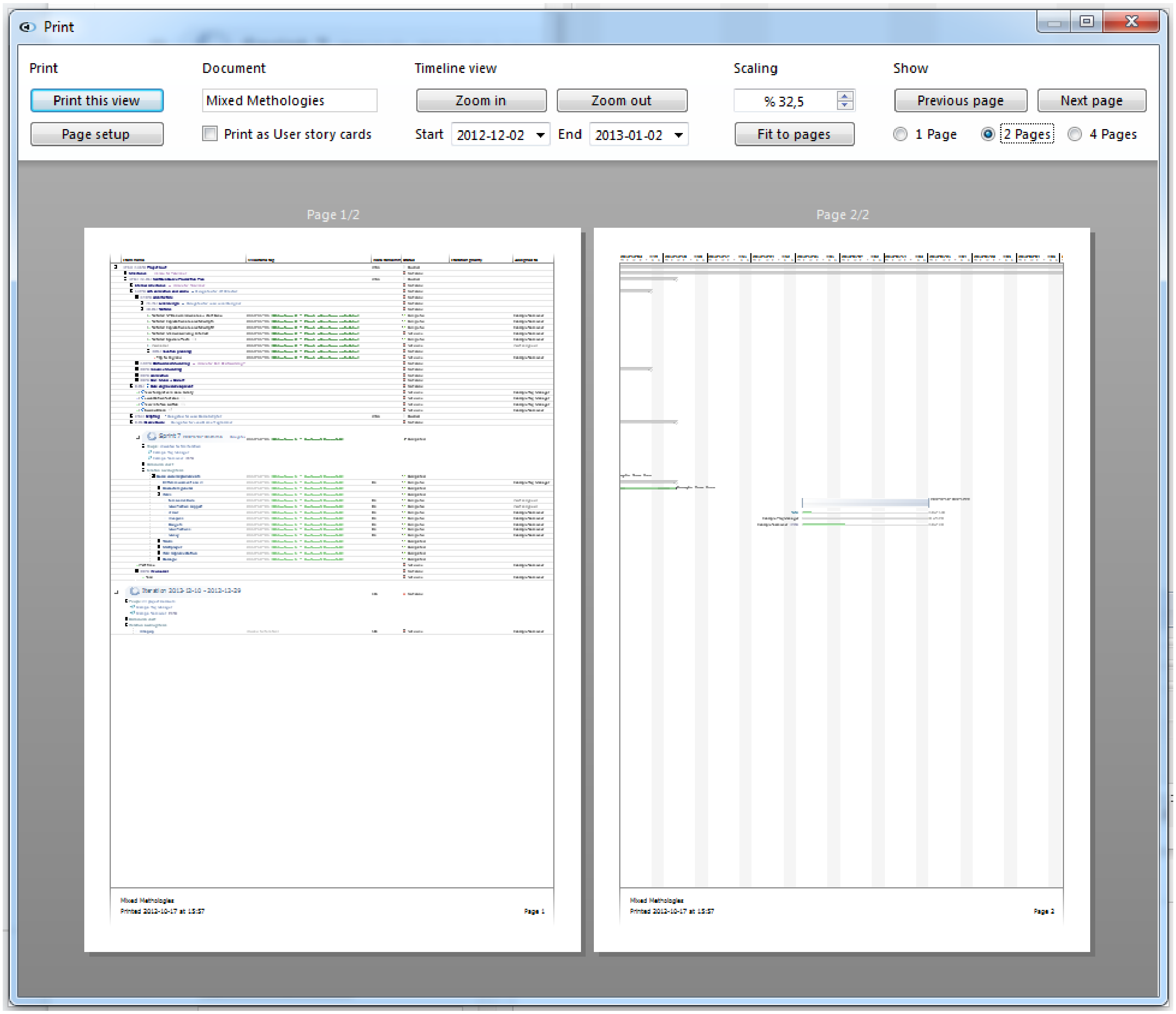
Click on Print (Ctrl + P, or Cmd + P) on the main main toolbar to bring up the Printing window.



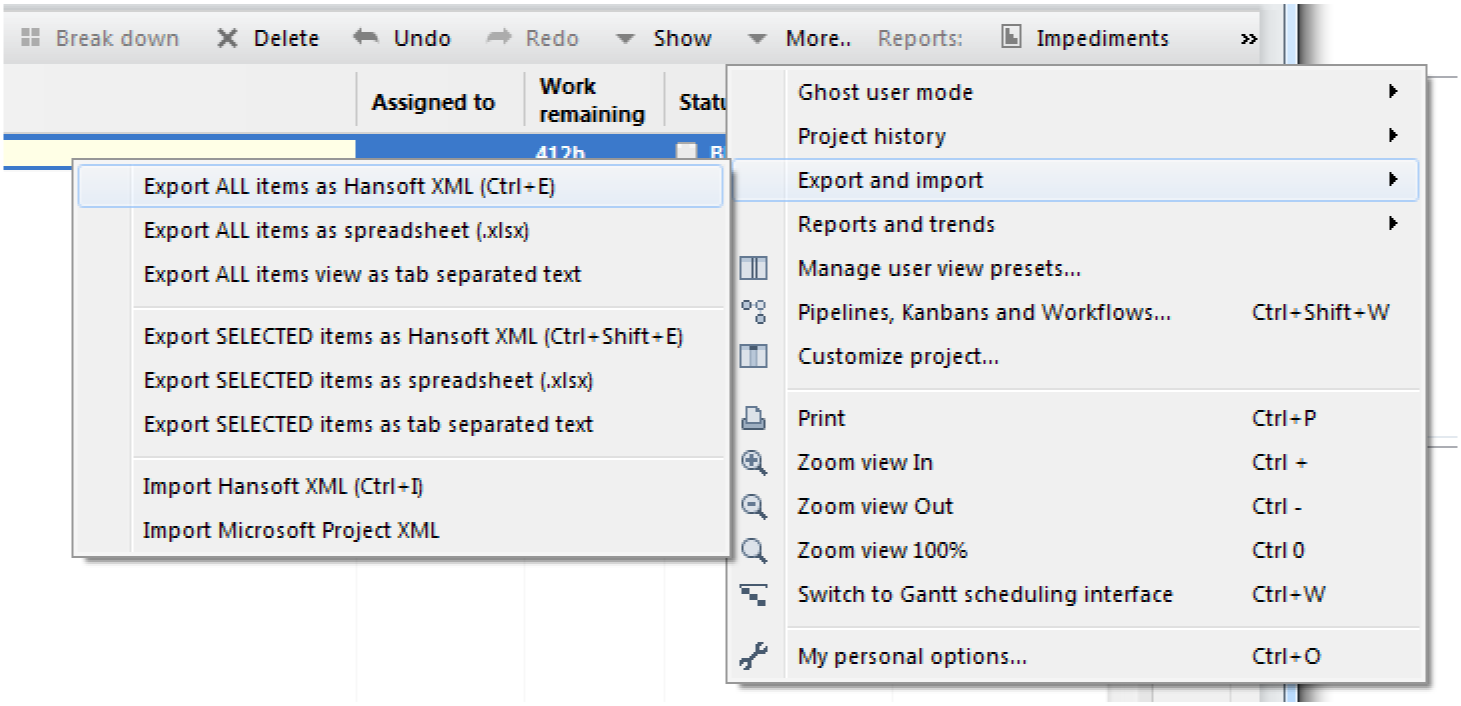
One easy way to change the way the document should be printed is to move the mouse over a column or the timeline view in the print preview. From there, you can grab it with your left mouse button and start dragging. With this action, you can change the column width or the timeline view start/end date.

Data importing/exporting (XML, spreadsheets or tab separated text)

All data in Hansoft Project Manager can be exported and imported as XML (eXtended Markup Language). This includes among other things users, projects, item lists and allocations. This can be very handy if you want to use

the project data that you have produced in another application. Many modern office programs and other applications support XML importing.

To export data press "Export this view as XML " in More.. > Export menu:



You can also export data in spreadsheet (.xls) format and as tab separated text.

You can import data in Hansoft XML format or in Microsoft Project (2003 or later) XML format. For a tutorial in how to import Microsoft Project 2003 XML click here.

Ghost user mode

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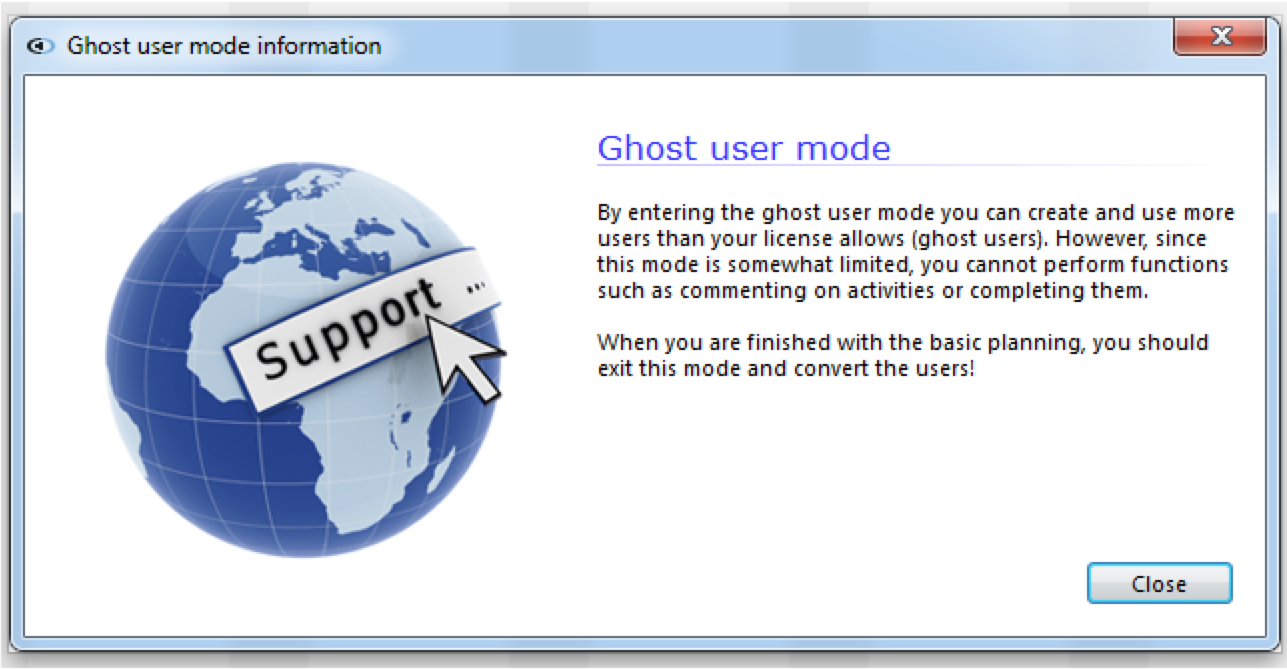
By entering the ghost user mode you can create and use more users than your license allows (ghost users). This mode is somewhat limited. You cannot, for example, comment on items/activities or complete them. You create and delete ghost users by clicking on "Manage ghost users" on the main timeline toolbar. The ghost users you create cannot login to Hansoft with their client until they have been converted to normal users.

When you are finished with the basic planning, it is recommended that you exit this mode and convert the ghost users to normal users. If your license capacity does not allow for conversion of all ghost users to normal users, it is recommended that you upgrade your license either by using the upgrade license interface, or by contacting support@hansoft.se.



Detailed task/item history

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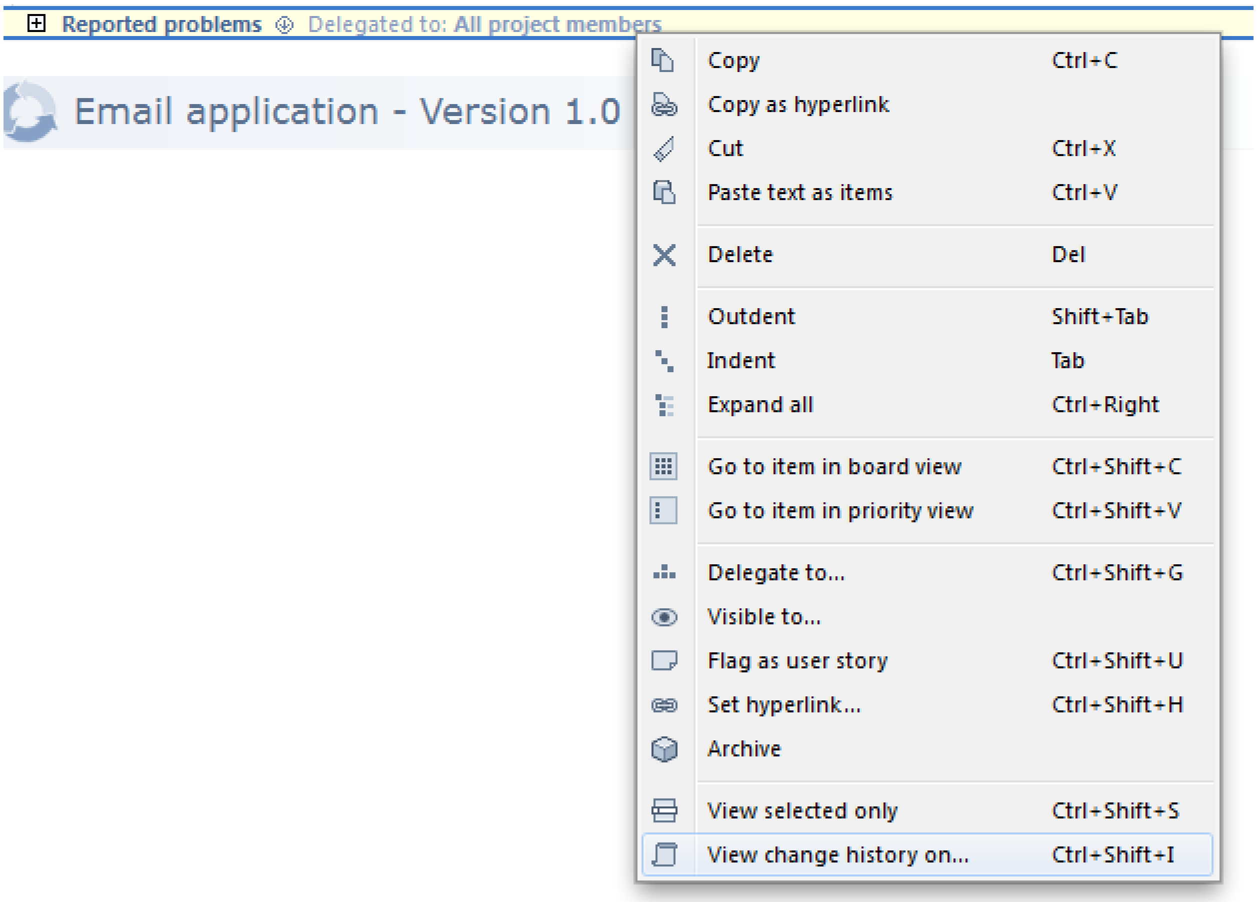
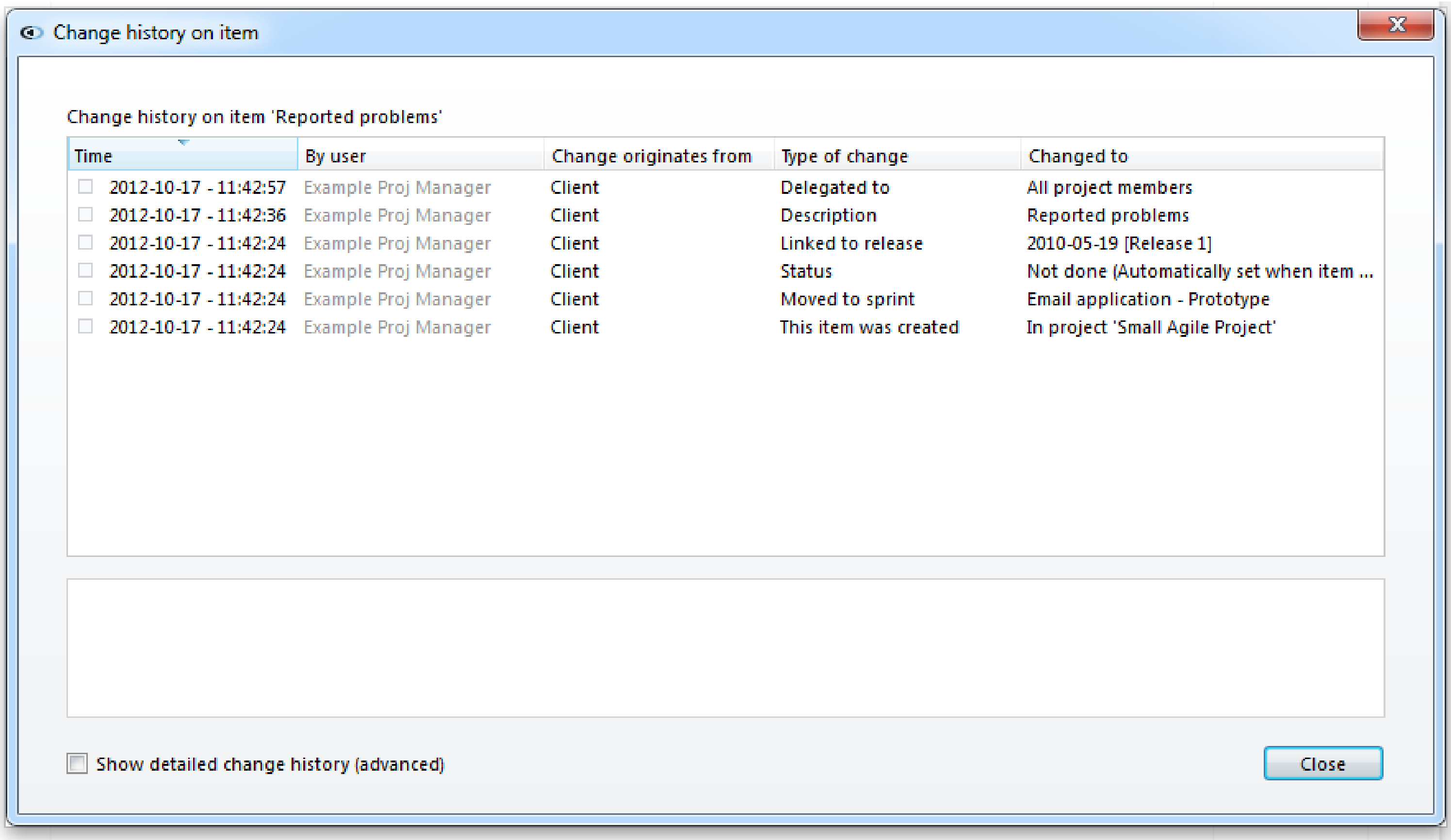
In order to analyse the actual workflow on a task/item you want to see the detailed change history.

Everything that happens to a task/item (or a bug) is stored on the Hansoft server and then retrieved on demand.

Right click and select "View change history on.." or press Ctrl + Shift + I (Cmd + Shift + I).



A detailed history will be presented:



Project History

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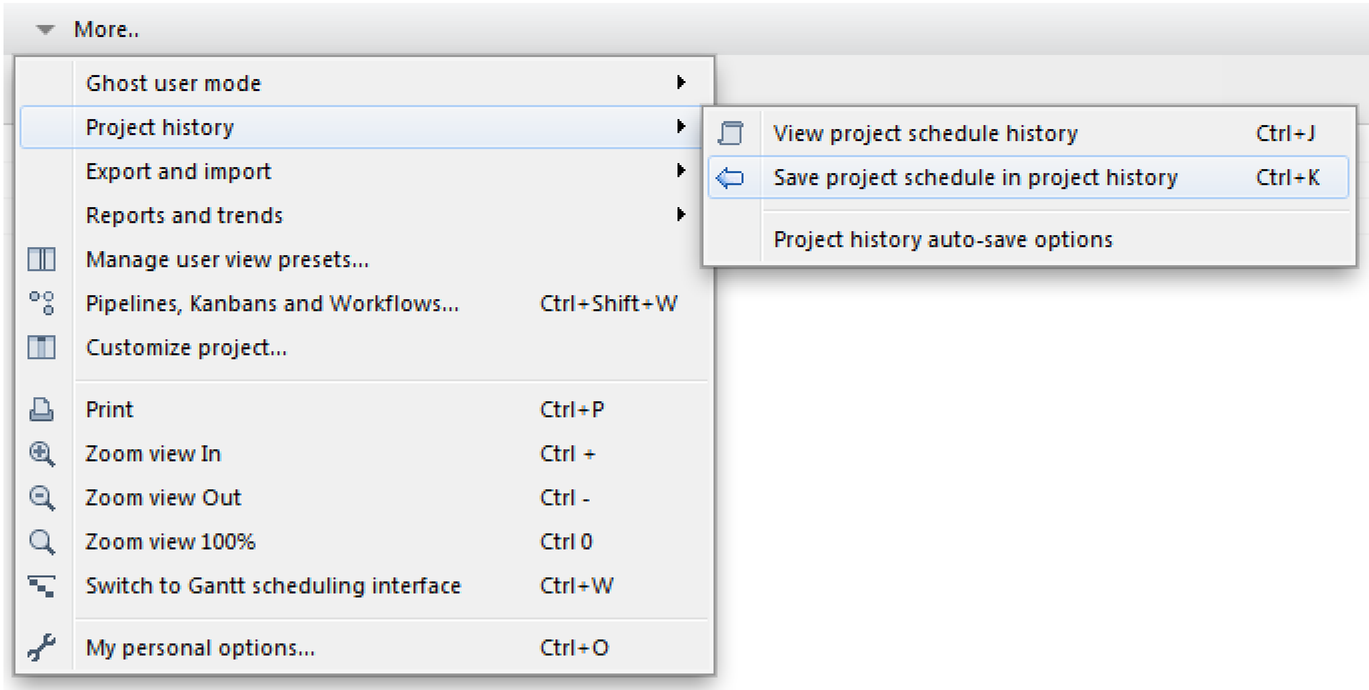
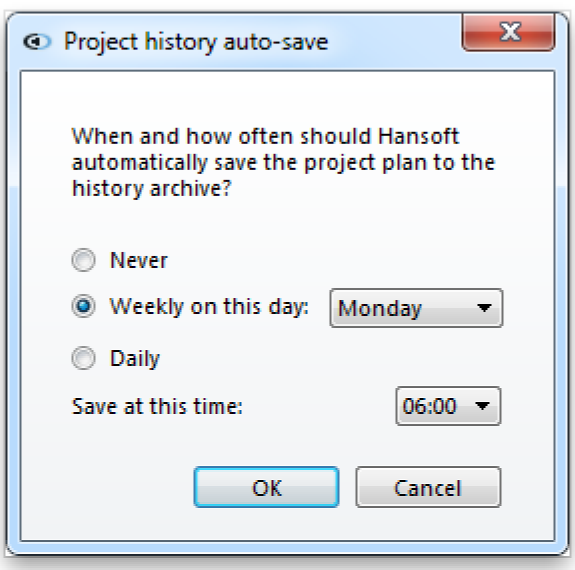
Save a perfect copy of the project in history and then compare it to the current one. Analyse slippage of milestones, user groups (such as programmers), individuals, sub-projects or specific tasks.

Project history is accessed through the More menu in the project. You can view project history, save the plan in project history and set auto-save options.

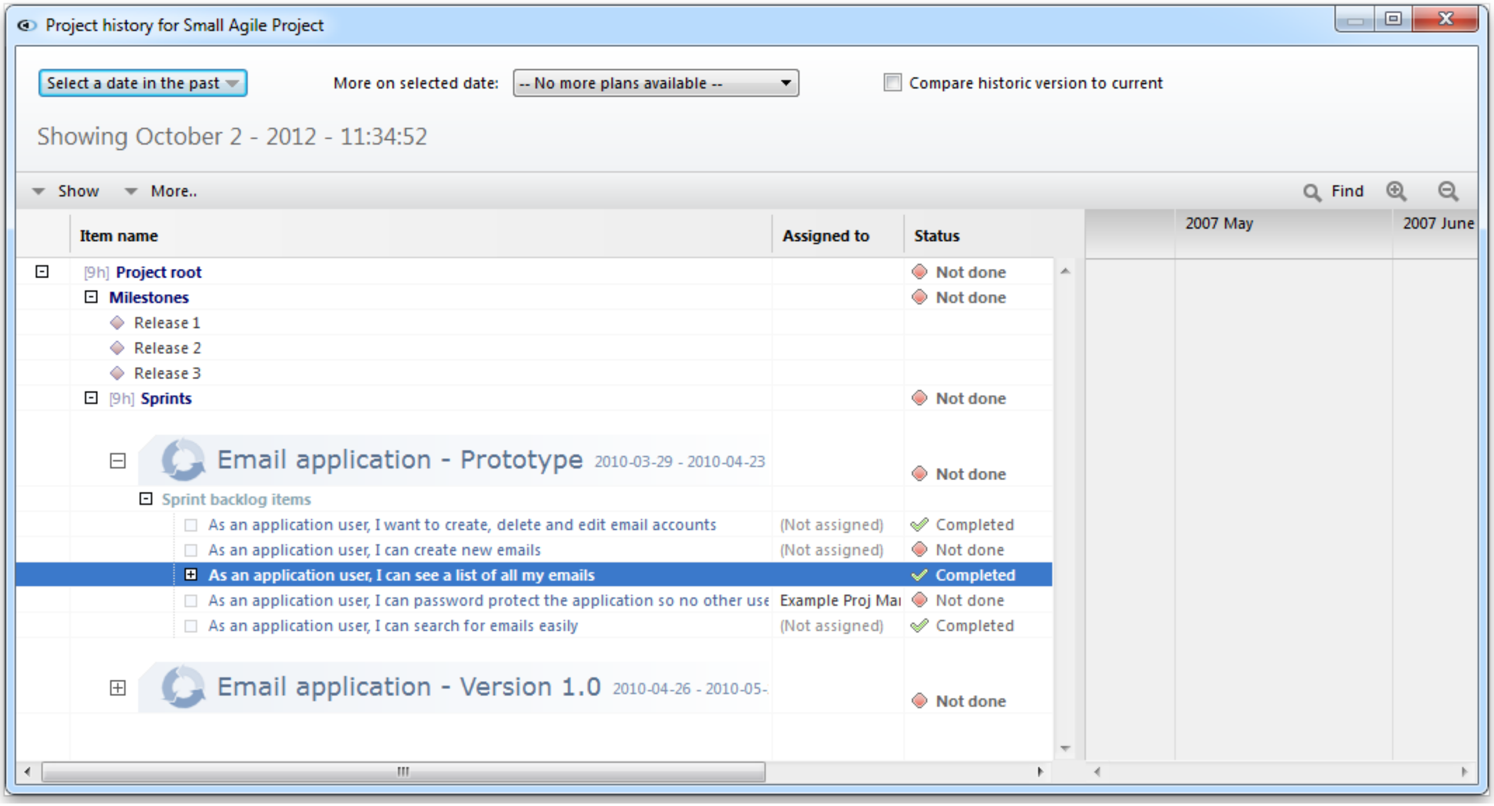
Tip: Before making a major change to the plan, save the current plan with Ctrl + K (Cmd + K). If not satisfied with your change, go to project history and roll back to the historic version.



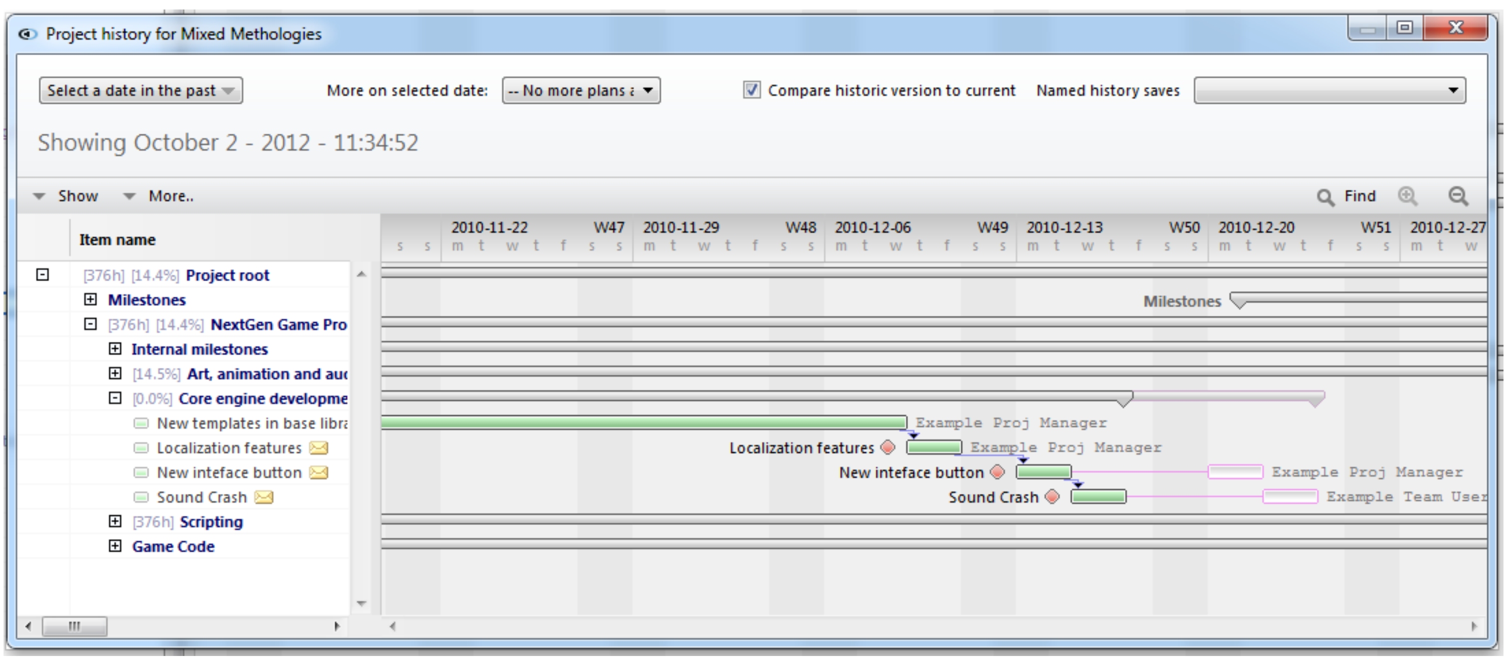
First, review the project history auto save-options. Automatically save project to the project history on a weekly or daily basis. Alternatively, you can turn auto-save off entirely.



Press Ctrl + J (Cmd + J) or select from the menu to view project history. Displayed is the nearest saved history with respect to the current date and time. Browse project plans on previous dates in "Select a date in the past." If you have saved more project plans on a selected date, use the drop down.



To compare current plan to a historic plan, click the checkbox. Magenta coloured text and visuals indicate change (often an indication of slippage). In the illustration below, we can observe heavy slippage by programmers (we have created a user group named 'programmers' and assigned users to a couple of tasks).

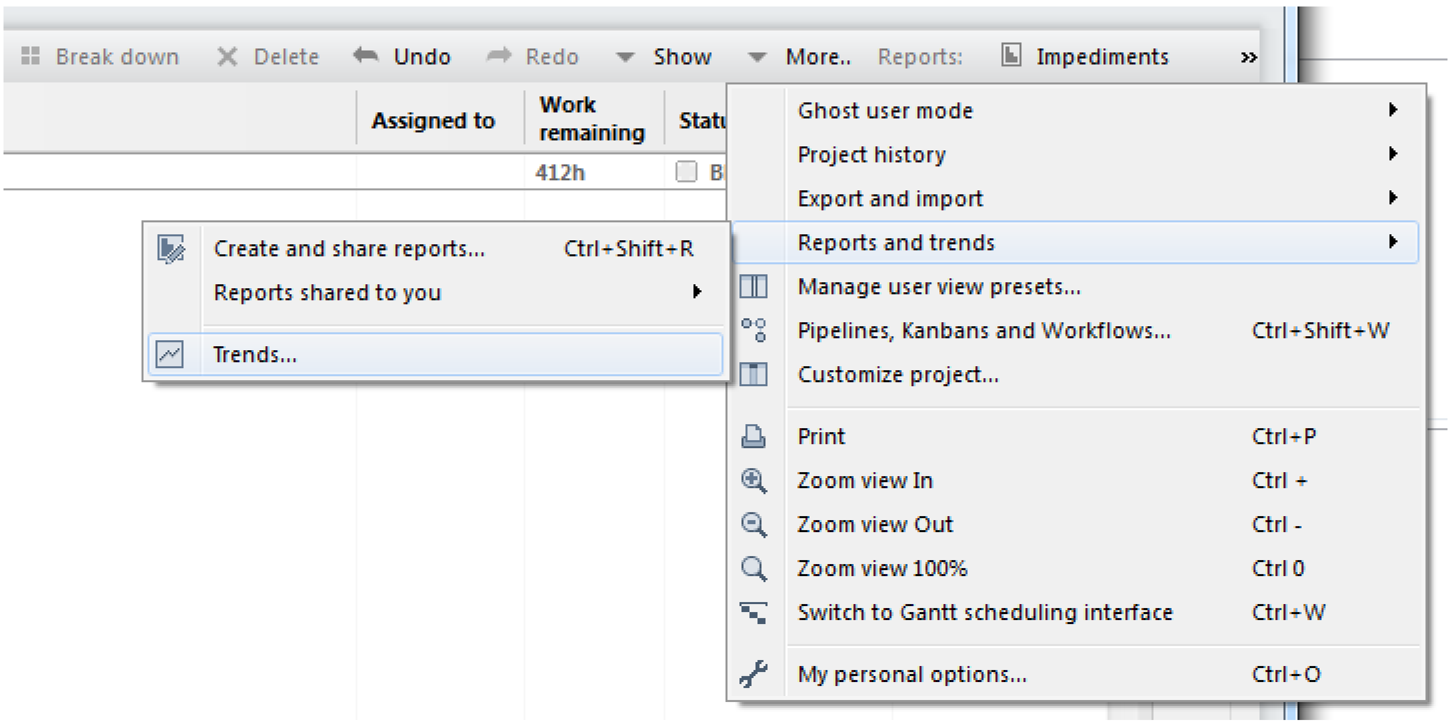


Trends in agile/scheduling projects

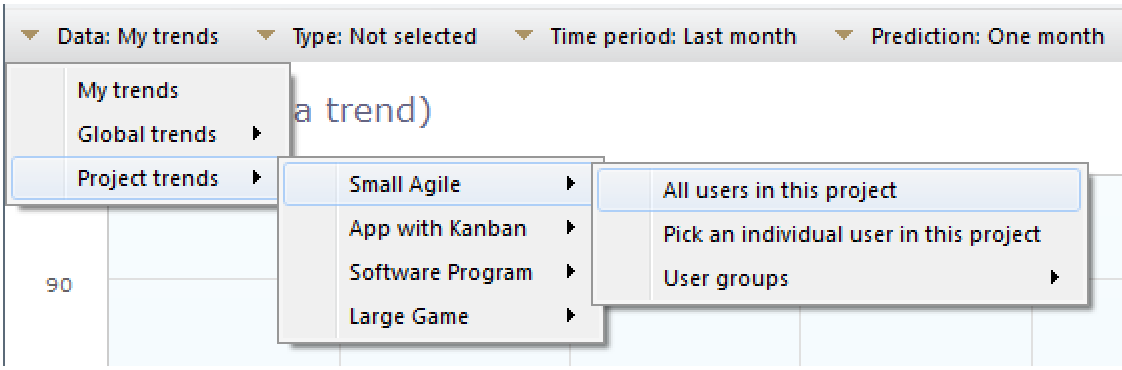
Analysing project trends can be vital to understanding how the project is progressing and for predicting when it is likely to be finished. Hansoft offers extensive functionality for project trends.

Trends in Hansoft are a combination of data (global, per project, per user group or individual) and type ("Work remaining", "Estimated ideal days" etc.). Trends in each project can only be accessed by "Main project managers." Trends on a global level (across all projects) can only be accessed by Administrators (those who can create user accounts and projects). Trends can be copied to the clipboard in order to be used in printed or web reports.

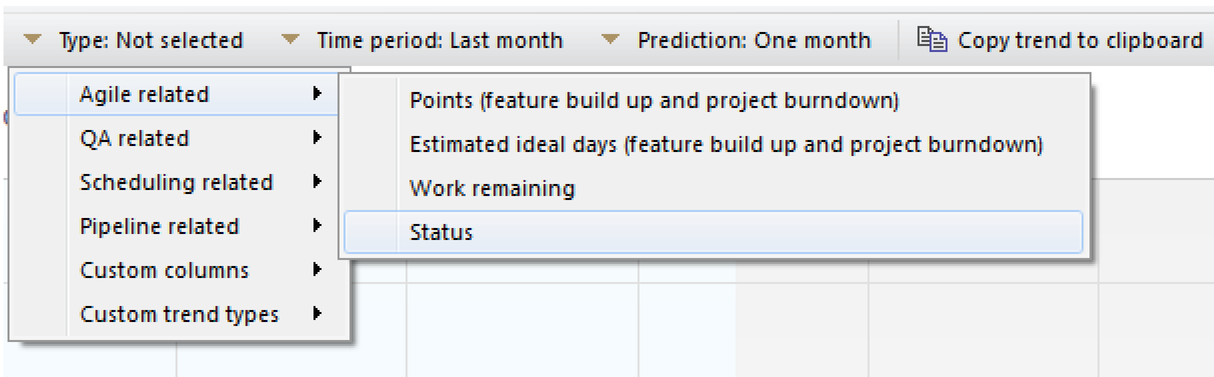
Go to the "Reports and trends" menu and select "Trends...":



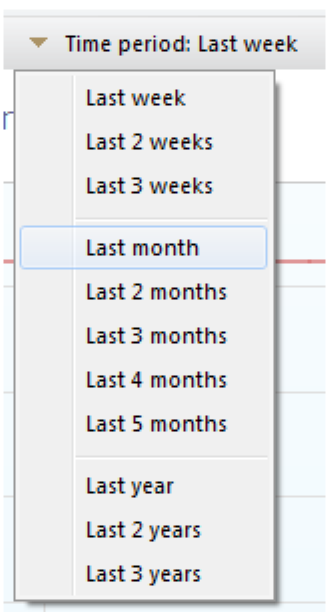
The trends window will now open and here you can select specific data:



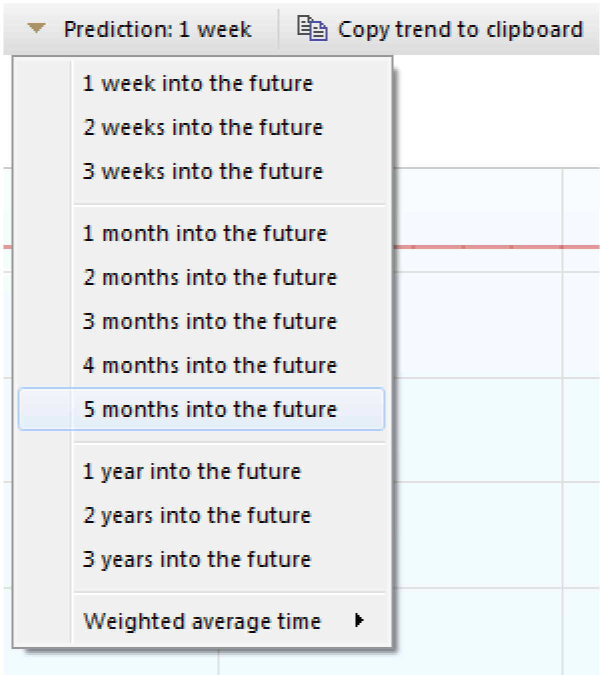
And type:



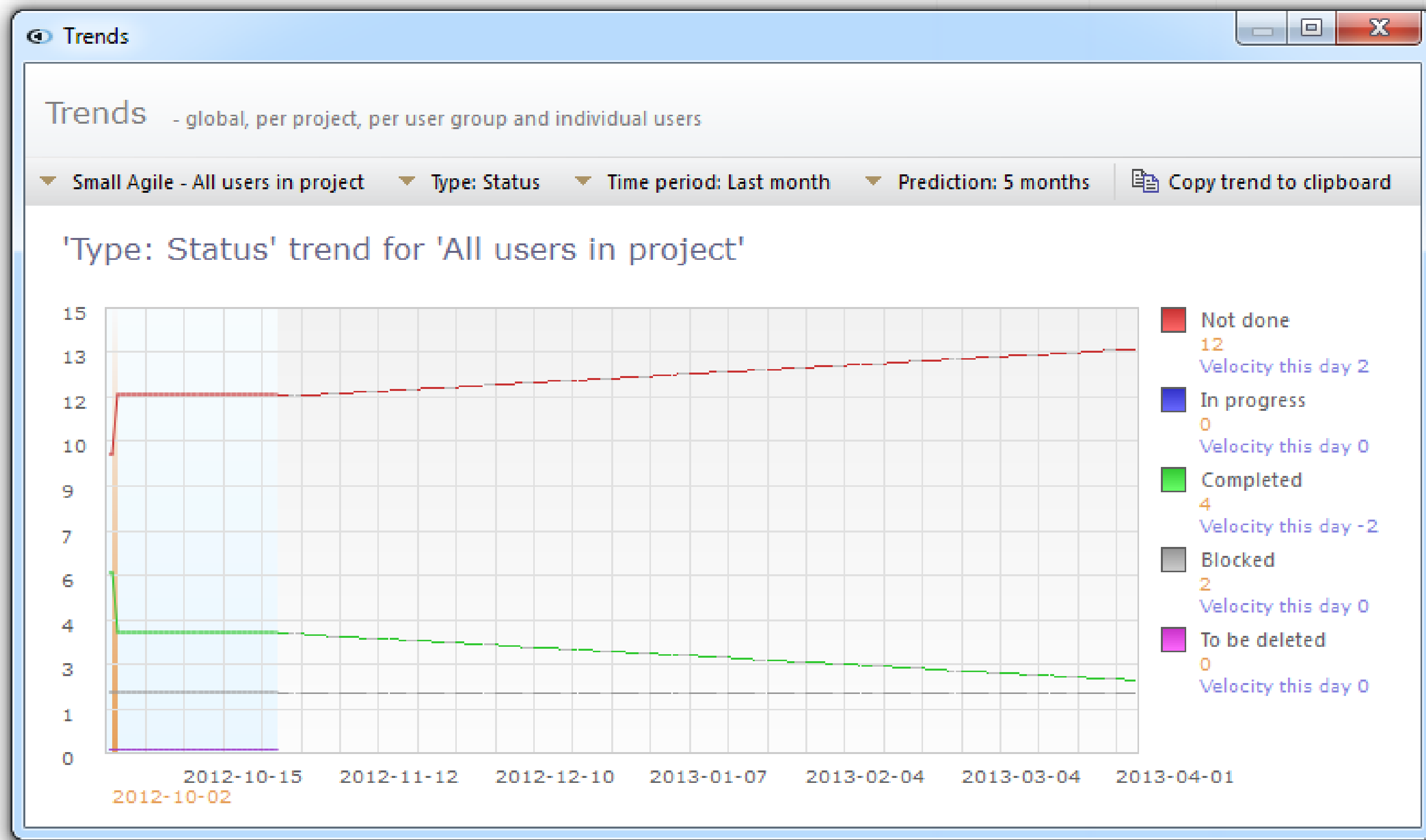
And the desired time period:



As well as the prediction time period:

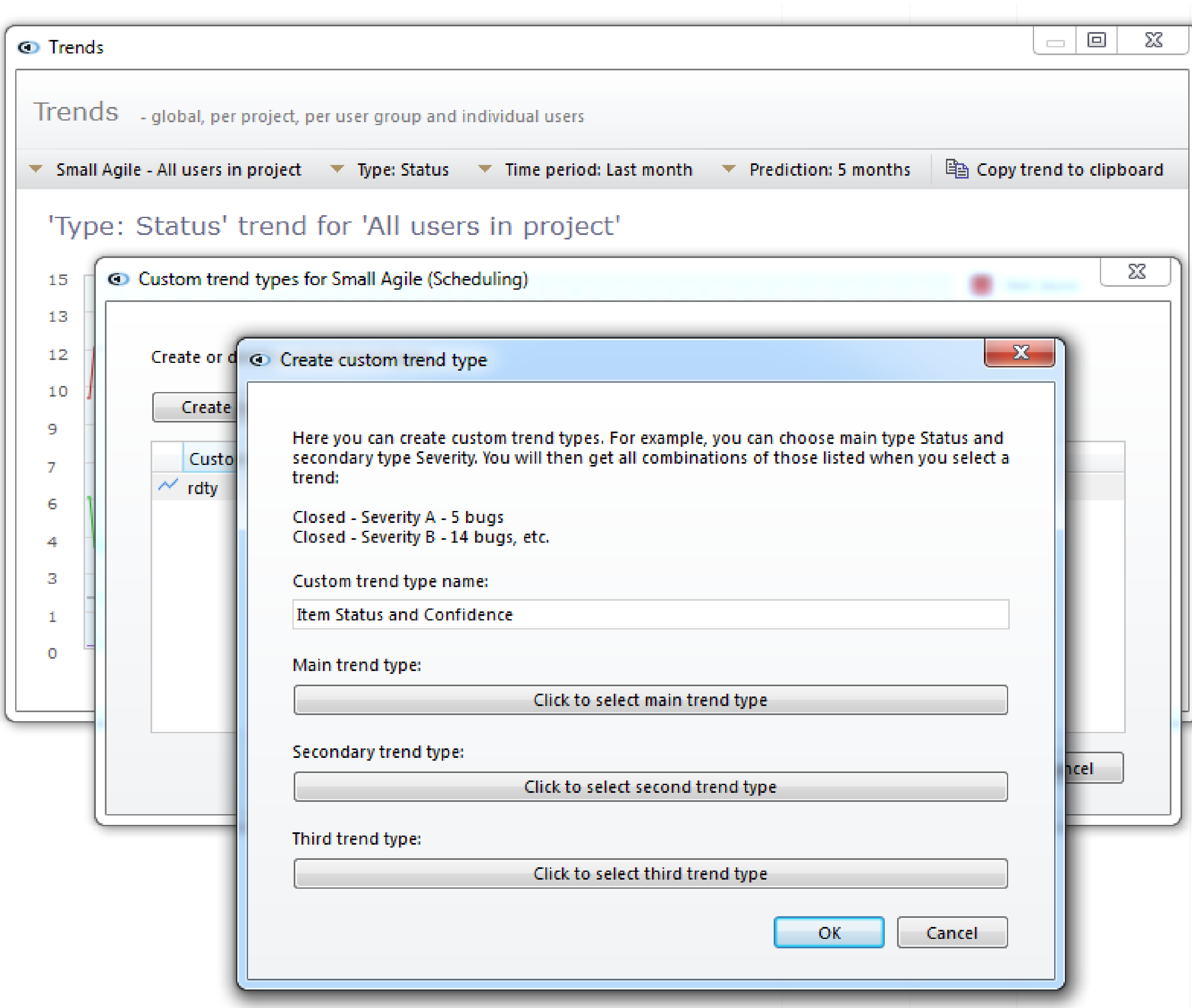


Resulting in a trend and a prediction:



You can create custom trend types by selecting "Custom trend types" in the "Type" menu. Custom trend types are mostly used to see how many items there are of one type per the another type (a custom drop list per item item status for example):

Please note that custom trends starts to be recorded when you create them, they are not retroactive. This is because saved data would otherwise fill up the hard drives on the server in a short time period.



Linking to tasks/items/bugs

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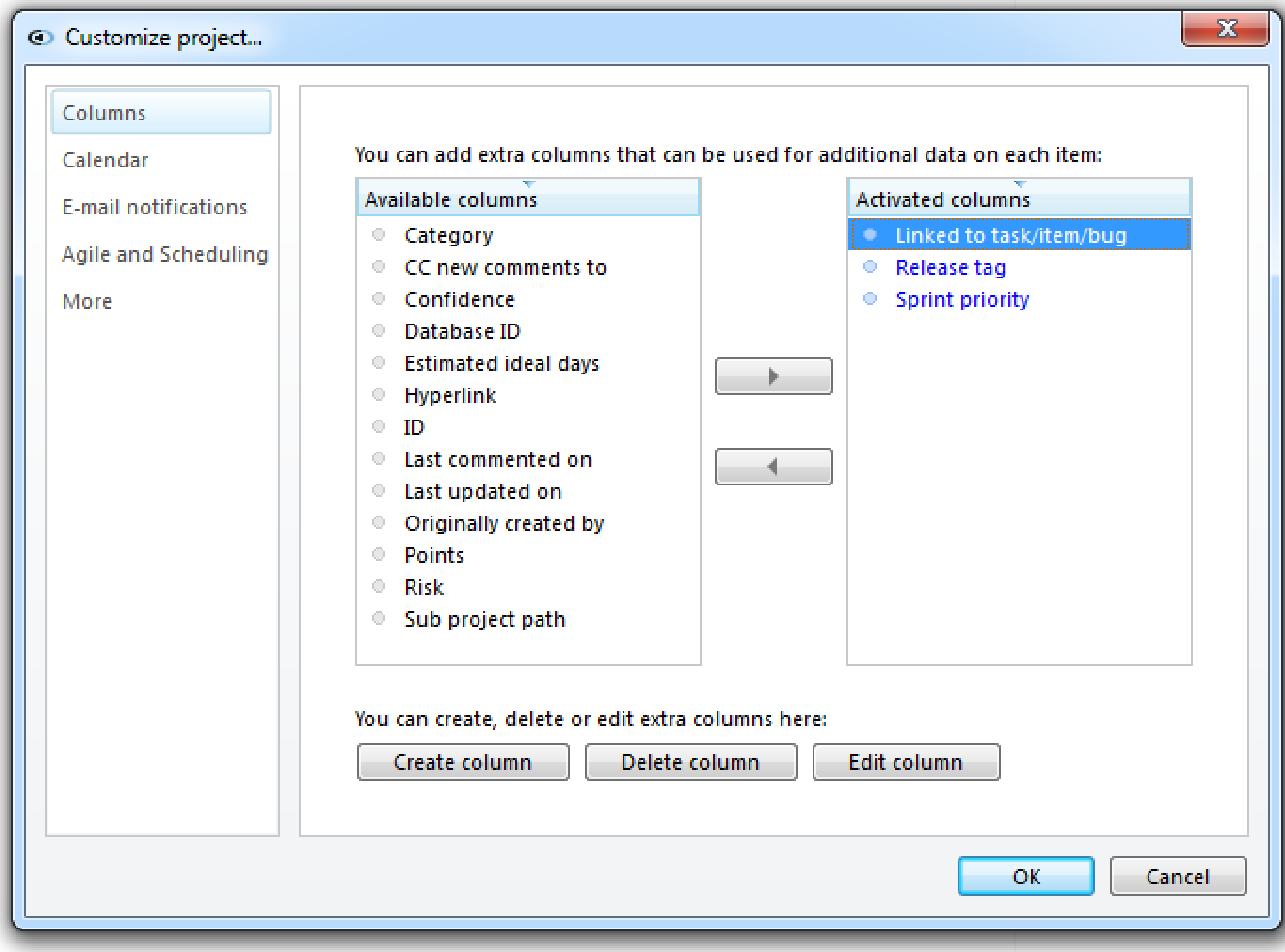
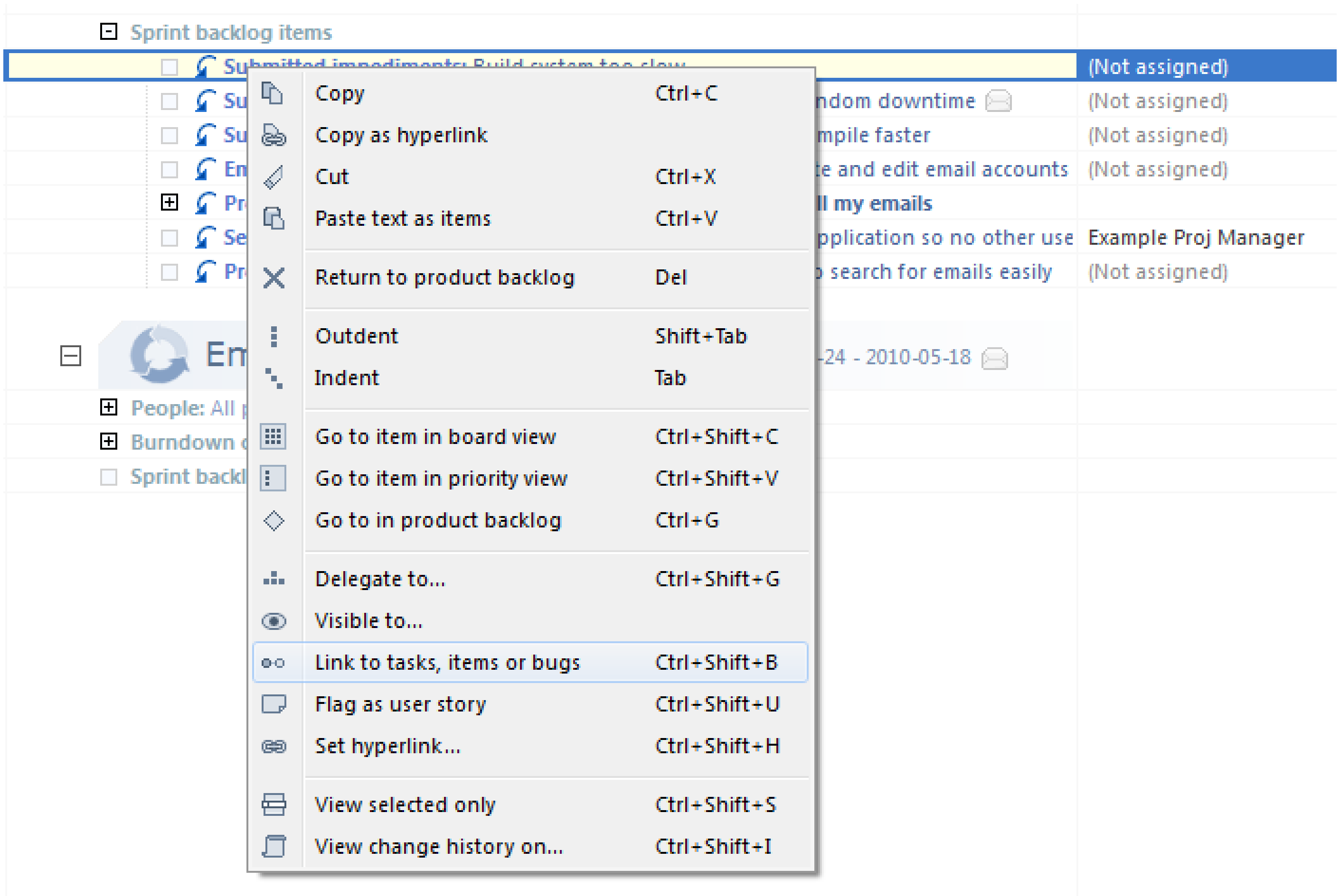
Hansoft offers functionality to link a task/item/bug to another task/item/bug. One of the most common scenarios is to link bugs to tasks and vice versa. This is useful, for example, when there are bugs related to a new feature in the product or in similar scenarios.

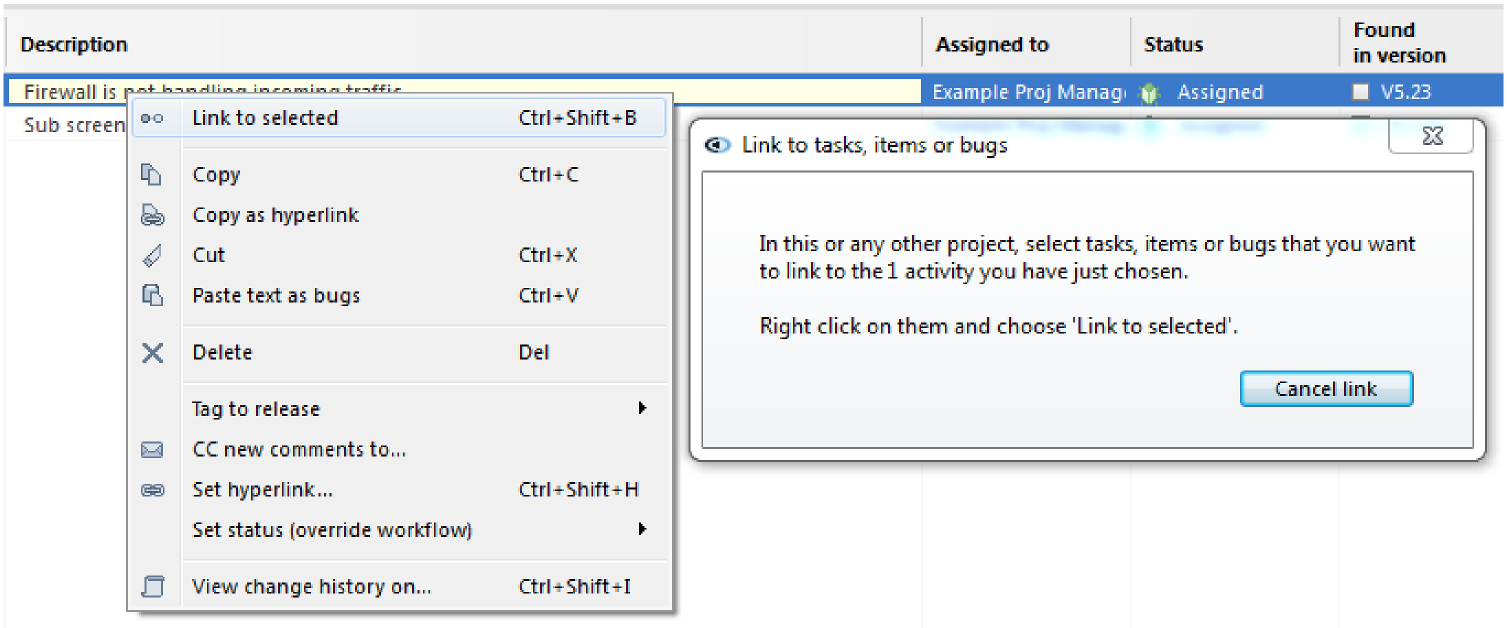
To activate this function, you must activate the extra column "Linked to task/item/bug" in Customise project (both in QA and in the project view):



Go to the task or backlog item and select "Link to tasks, items or bugs":



Now go to the QA view, right click and select "Link to selected":



A link to the task/backlog item will now be visible in the column (it is cross-linked so a bug link is visible in the project view):

Options

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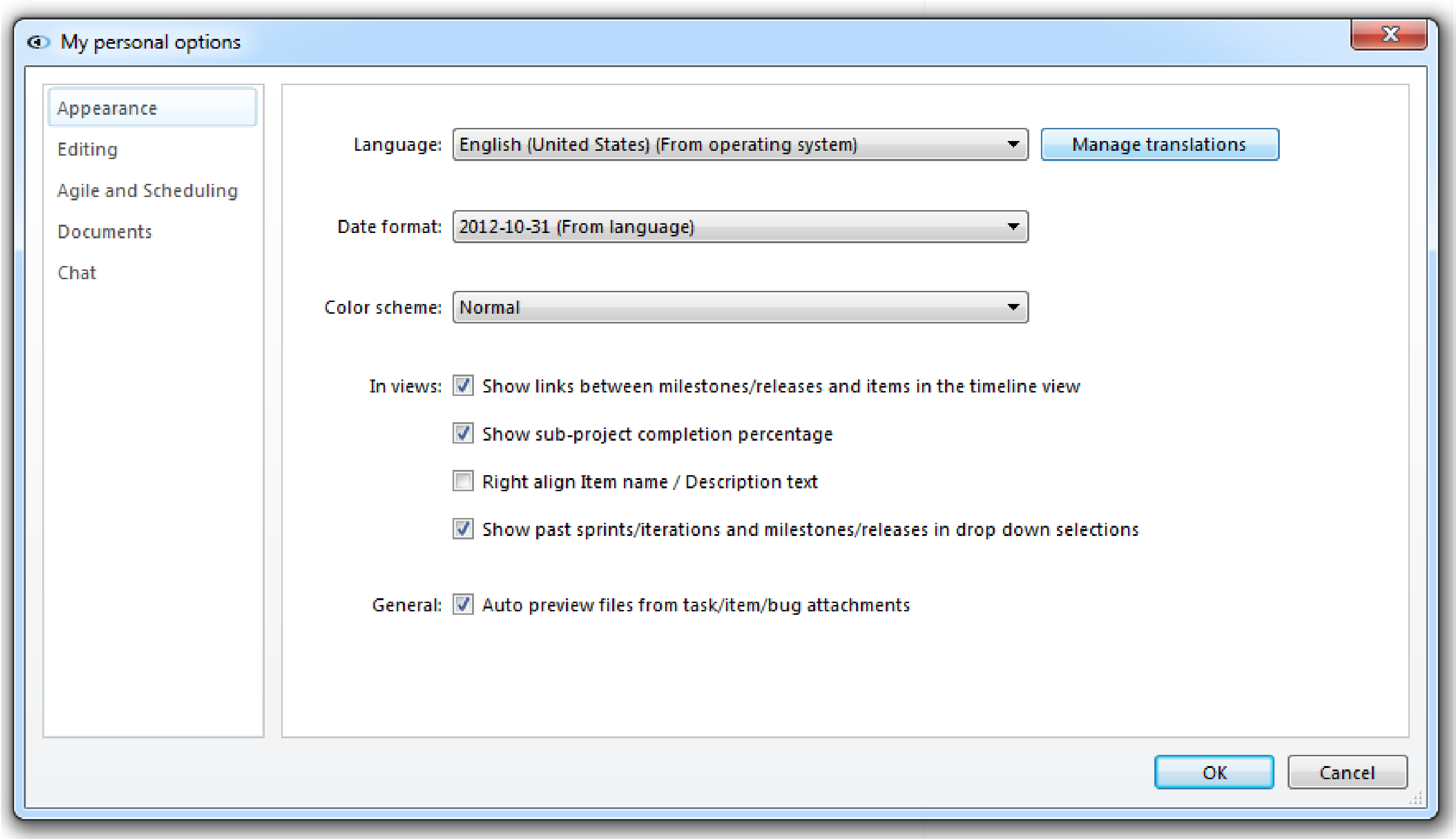
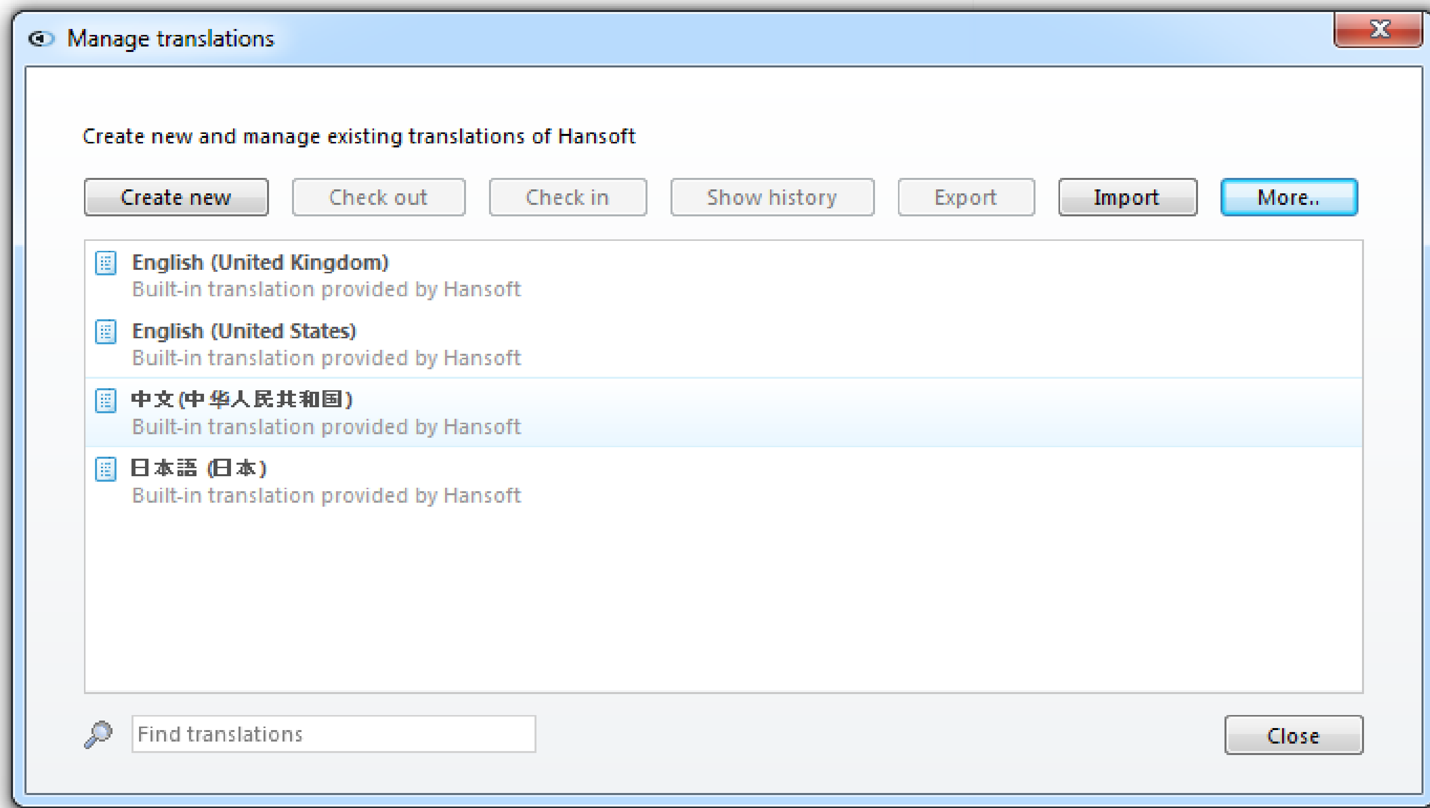
You can open the Options window in Project schedule, Backlog, Quality assurance, Administration or in the To do list. You can use Ctrl + O (Cmd + O) to open the options window (recommended if you switch options often).

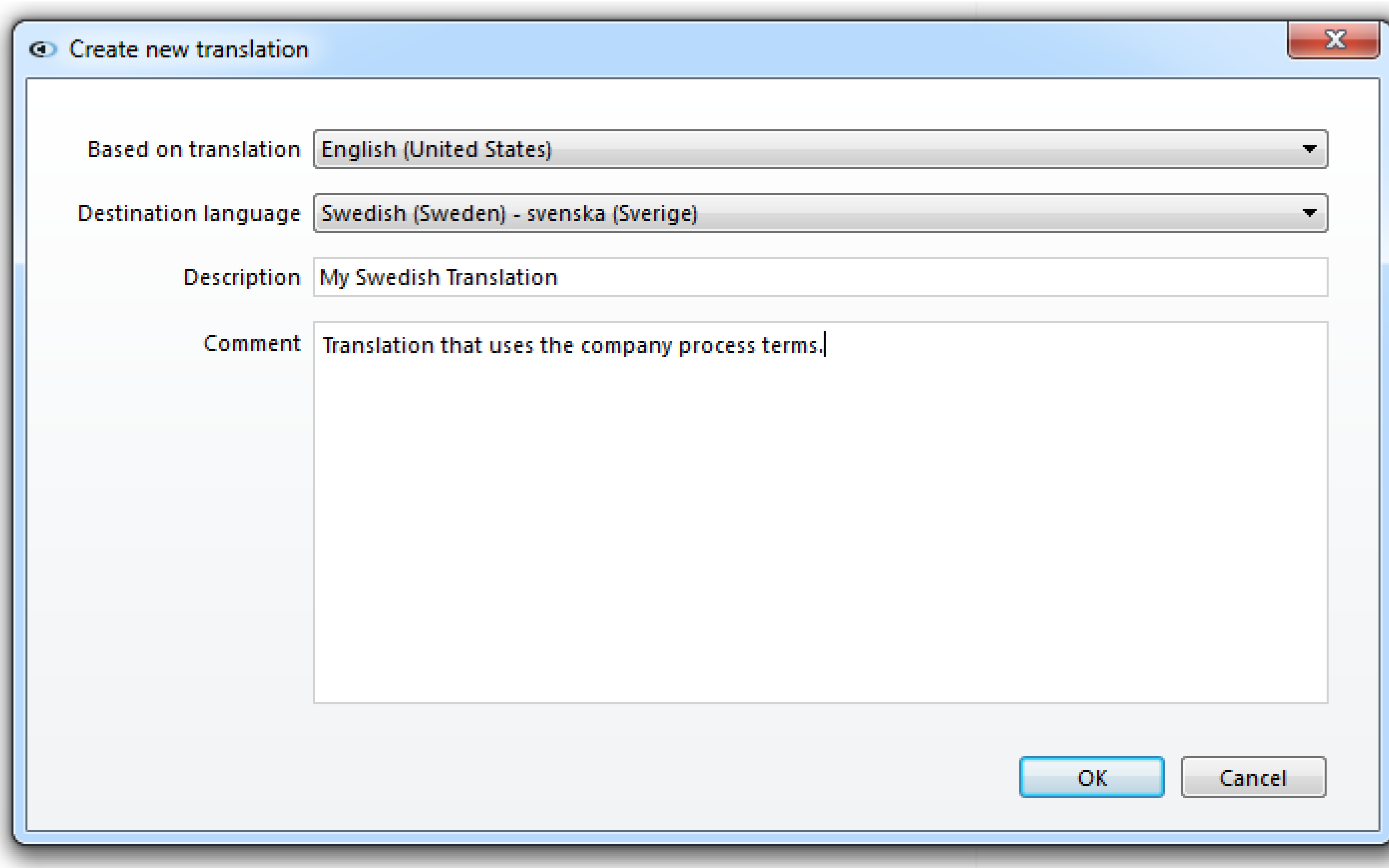
The options are both personal and global and will affect all views in Hansoft.



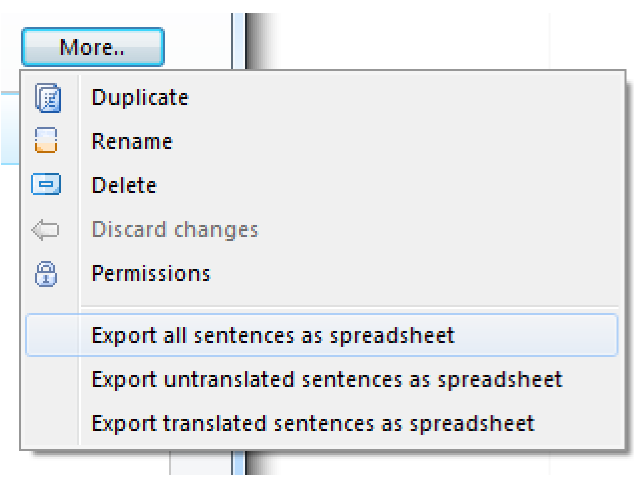
From Options you can open the Manage translations window. Here you can create new and edit your own translations or import translation that the Hansoft community has done.



Create a new translation and select the destination language for what you are translating to. "Based on translation" language will provide you with information later on when you have to update your translation when Hansoft adds new or edit sentences.



The other options works similar to the document management in Hansoft. Check out, Check in and Show history provides you with the basic functionality for editing the translation files. Export are used when you want to export the translation you have done in a binary one-file format to share with a community. In the more menu you can duplicate, rename, delete and discard changes. You can also set permission on a translation on whom can edit them. If you want to analyze what you have translated you can export what you have translated and not translated to a spreadsheet file.



Pipelines, kanbans and workflows

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Introduction

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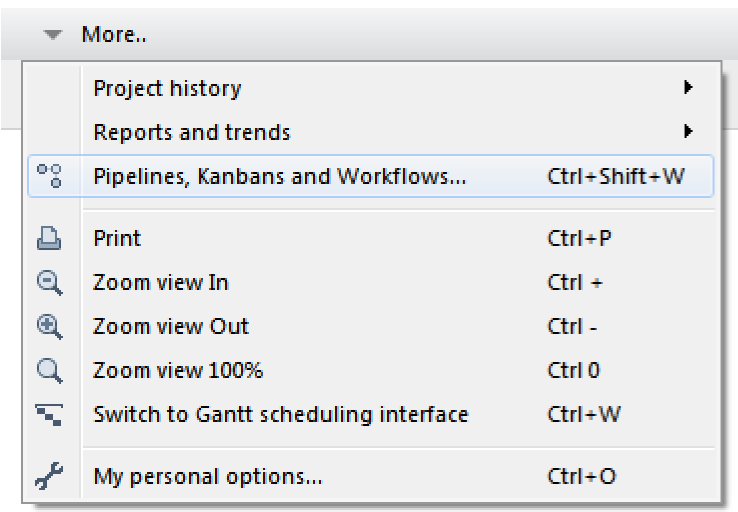
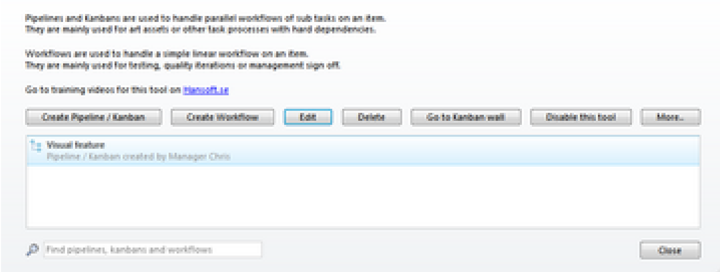
Pipelines and workflows are used to describe the order in which tasks are performed. It is useful for facilitating hand-offs, sign-offs, or simply to embrace the iterative nature of many development environments. Pipelines, which are also used in Kanban planning, define a "tree" of tasks, which can be executed in parallel or in sequence, while workflows define the possible states a task can be in.

The pipelines, kanbans and workflows tool is accessed in the More menu, or by pressing Ctrl + Shift + W in the schedule or backlog views (Cmd + Shift + W). Workflows are also available for Quality Assurance items.



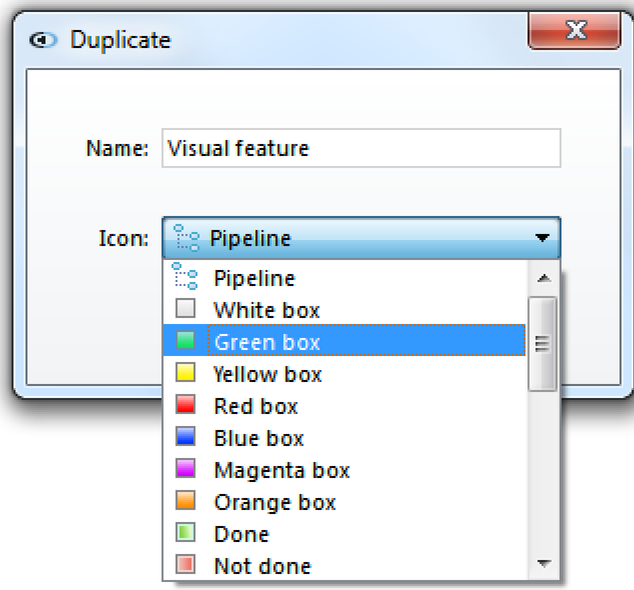
Entering the Pipeline, kanban and workflow tool from the More menu

Before pipelines and workflows can be used, the tool itself must be enabled. This will create a "Pipelines / workflow" column in the project view and in the backlog, allowing for assigning a specific pipeline or workflow to an item.



The Pipeline, kanban and workflow tool

After the tool has been enabled, users can create and manage pipelines and workflows. One particularly important feature is the duplicate tool (found in the More menu), typically used to extend and adapt a previously designed pipeline or workflow.



Duplicating a pipeline or workflow

Pipelines

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Pipeline fundamentals

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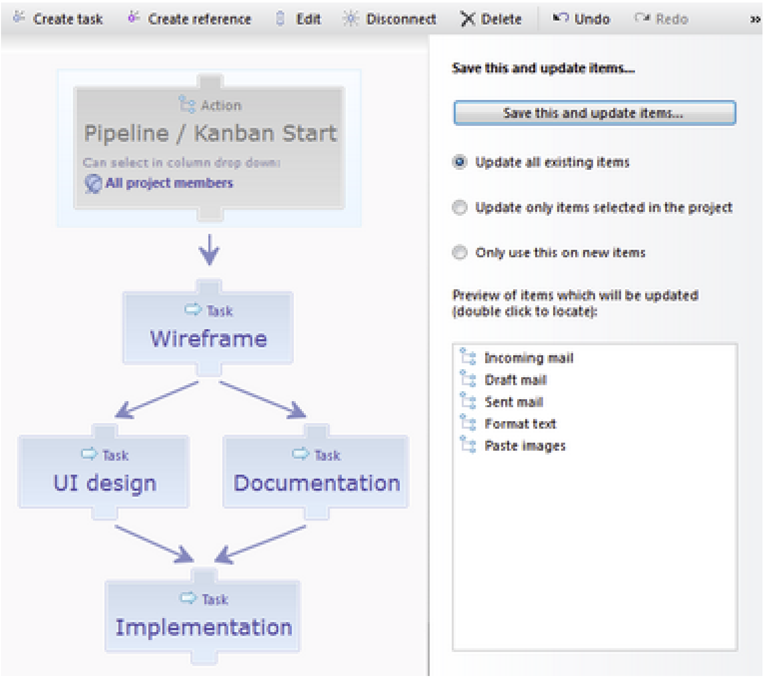
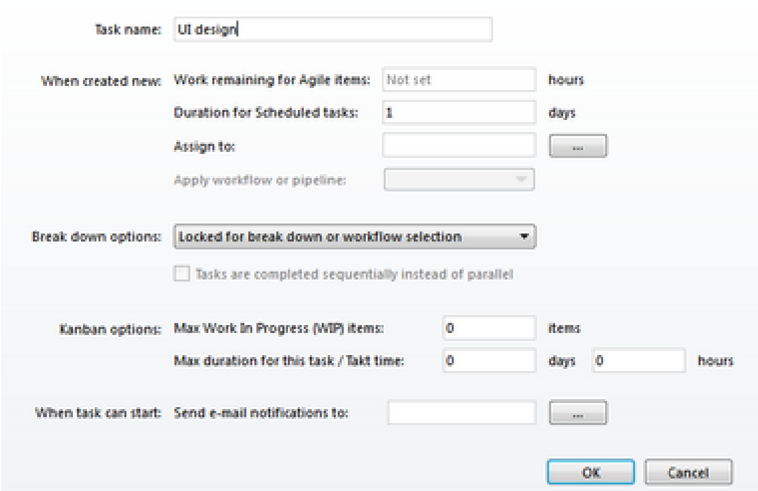
A pipeline is used to structure work done on complex tasks that may have dependencies. It is made up of pipeline tasks, each of which represents a step in the pipeline. Tasks are then connected, to represent the dependencies that exist, enabling a wide variety of possible pipelines that can have both sequential and parallel chains.



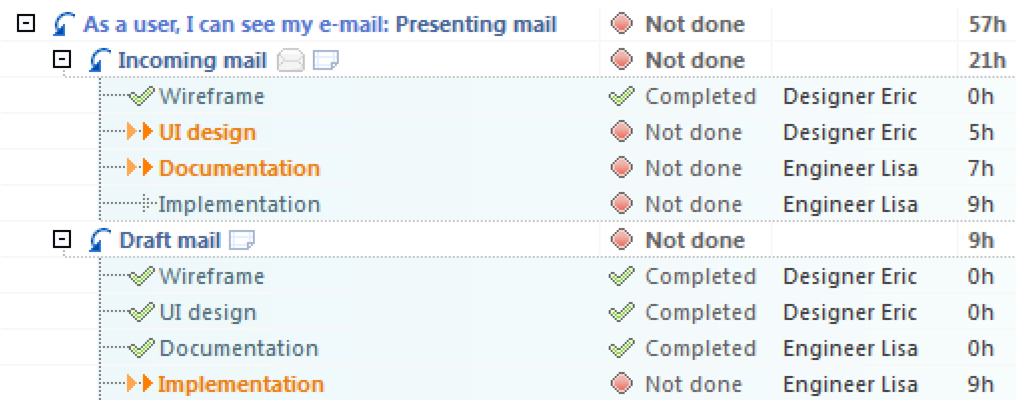
A pipeline showing both sequential and parallel work

Pipelines can be set up with default behaviors for assignment, work estimates, and restrictions for if and how tasks can be broken down into further subtasks.



The properties dialog for a pipeline task

When a pipeline is applied to a task in the project schedule, subtasks will automatically be generated. Any tasks that can be worked on will be indicated, and appear in the To do lists of the users who the pipeline tasks have been assigned to. Beyond this point, pipeline tasks behave much like regular tasks, with a few restrictions such as the inability to set priority (the priority is inferred from their order in the pipeline). Completing a pipeline task will progress the pipeline, activating dependent tasks.



Pipelines in the schedule view

Building a pipeline / kanban

Pipelines are built by inserting pipeline tasks, and connecting them to illustrate the flow of work through the pipeline. In addition to adding pipeline tasks, references to other pipelines can also be inserted.

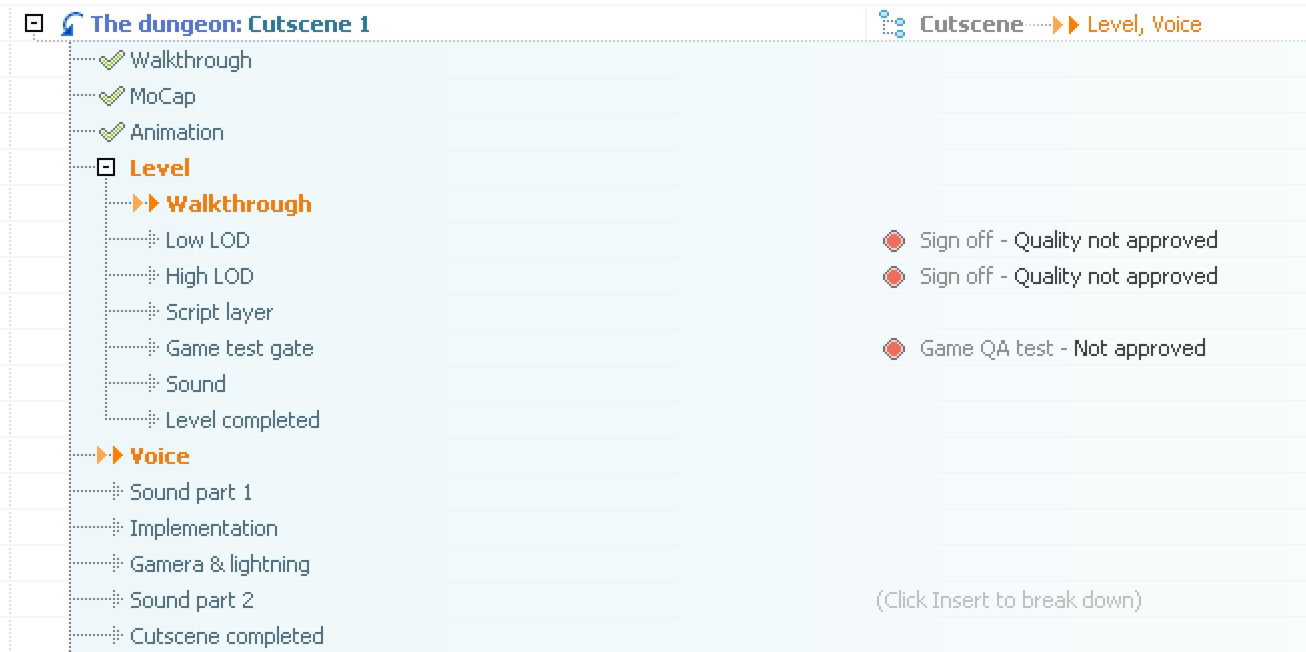
Pipeline tasks

Jump to the next chapter if you want to know more about [pipeline task settings](#).

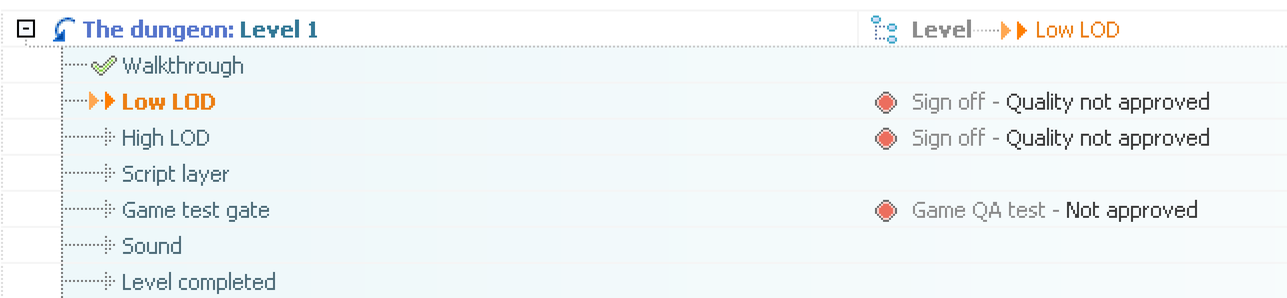
Pipeline references

In a pipeline you can make a reference to another pipeline. This is very useful when building more complex pipeline structures.

In the screenshot above pipeline 'Level' is a reference in pipeline 'Cutscene'. This is reflected when selecting pipeline 'Cutscene' in the project view:

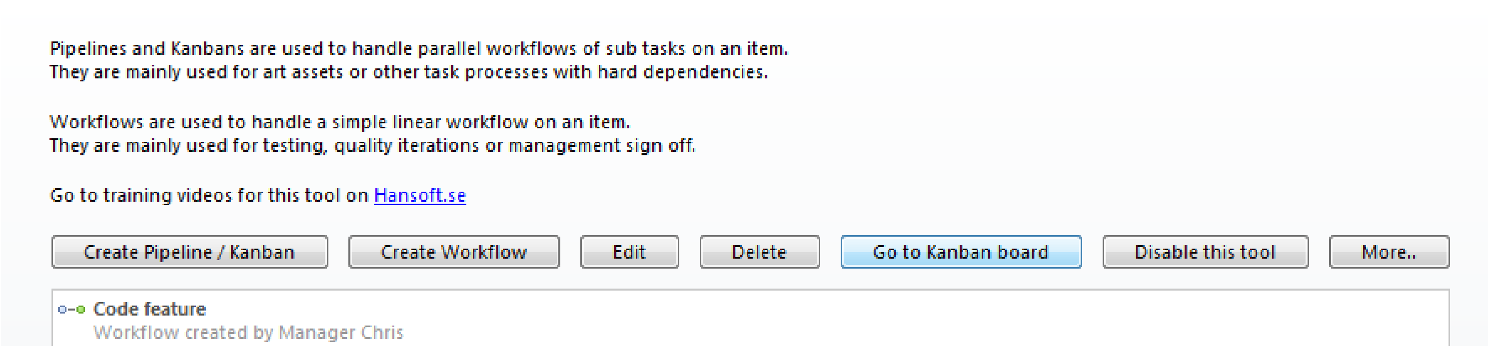


Pipeline 'Level' can also be used as a standalone pipeline:



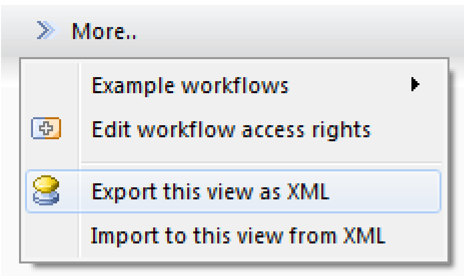
Kanban wall view

A powerful visualisation of and a way of working with pipelines is through the Kanban wall view. If you go back to the Pipelines, kanbans & workflows window you go can go to the wall view directly:



Exporting and importing pipelines

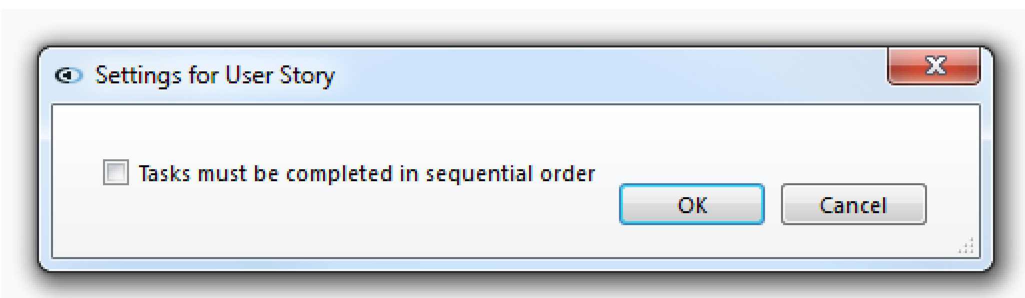
Under the More menu you can export and import your pipelines as XML. This is useful when transferring pipelines between projects or databases.



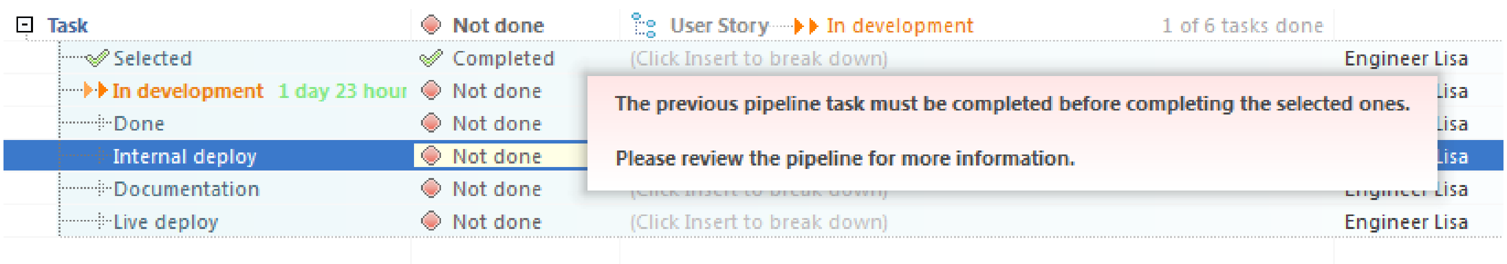
Pipeline settings

In the More menu, under Pipeline settings, you can decide on settings affecting the whole pipeline (but not pipeline references).

Here you can decide if the pipeline must be completed in sequential order or not.



If a pipeline must be completed in sequential order team members will not be able to change item status before it can start.



Pipeline task settings

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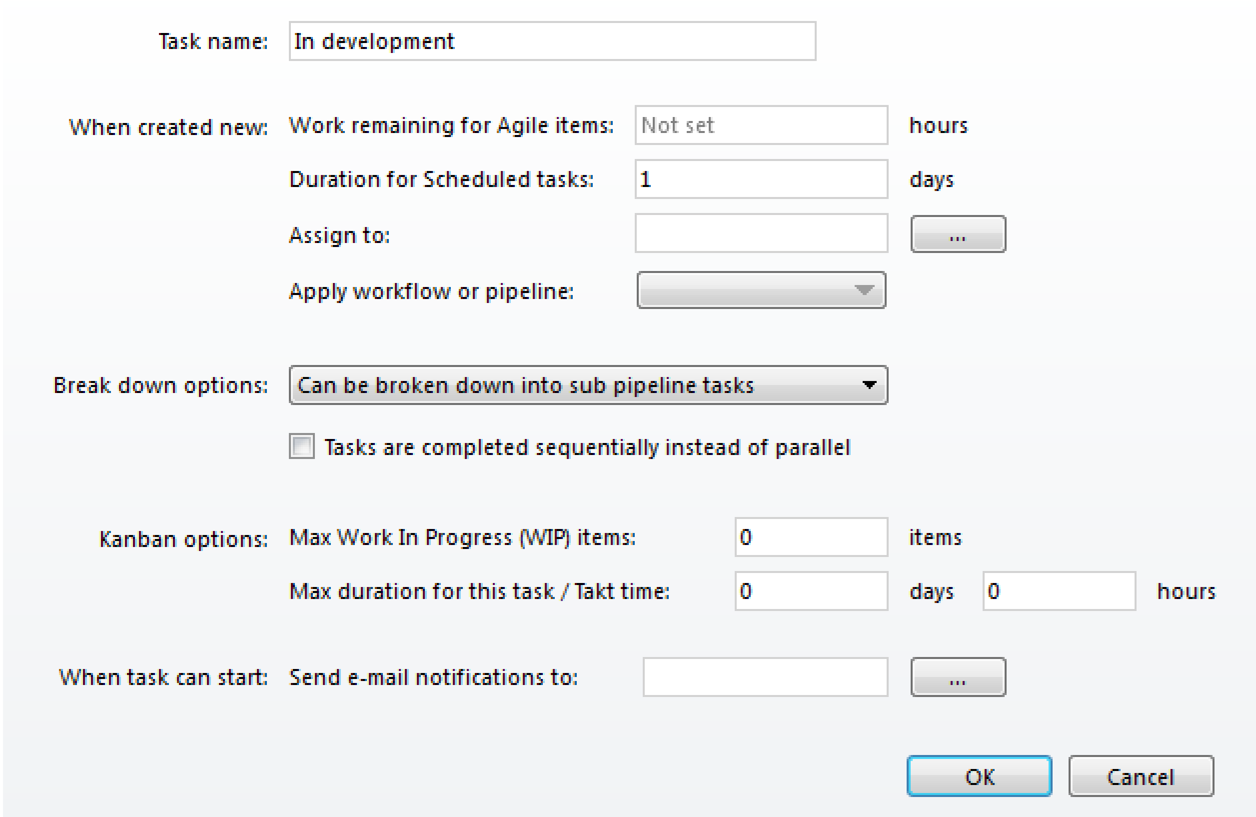
Editing a pipeline tasks brings up this window:



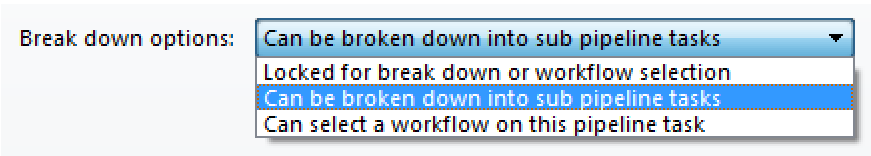
Pipeline task settings

The pipeline task name is reflected when selecting a pipeline in the project view.

Options for newly created pipelines

When a new task is created, it can be given a default work remaining or duration, be automatically assigned to a user or user group, and have a particular workflow or pipeline applied to it.

Breaking down tasks



Pipeline tasks can be allowed or restricted in terms of how they can be broken down, and whether a workflow can be applied to the pipeline tasks. Enabling break down lets users insert or paste subtasks on the pipeline task in the project view. Letting users select a workflow is useful for quality sign-offs on pipeline tasks.

Kanban options are described in the Kanban chapter.

Note: Whenever a pipeline is updated, certain information (user assignments, rescheduling, work remaining etc.) might be destroyed. For this reason, the options above apply to newly created tasks, rather than existing ones.

Updating and deleting pipelines

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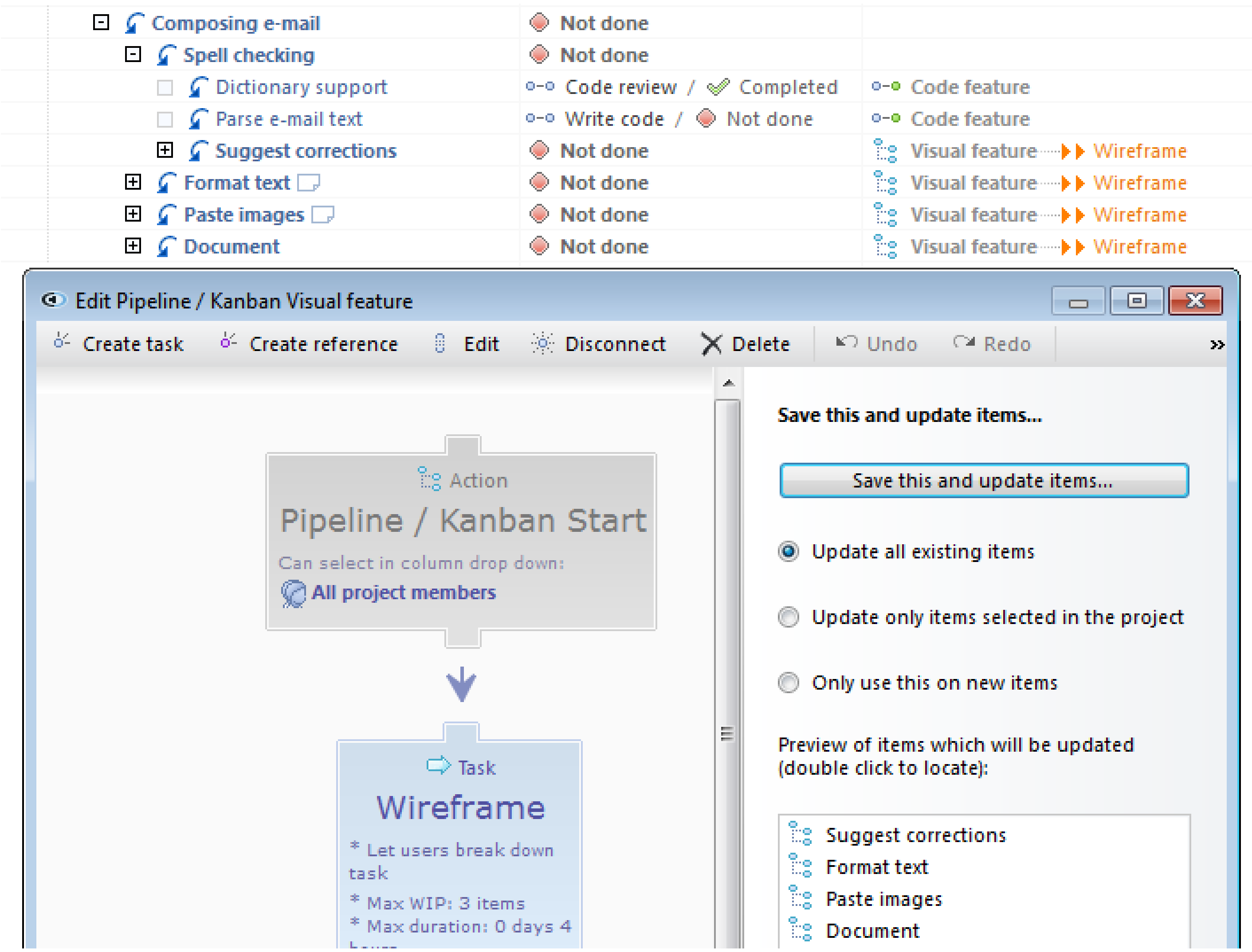
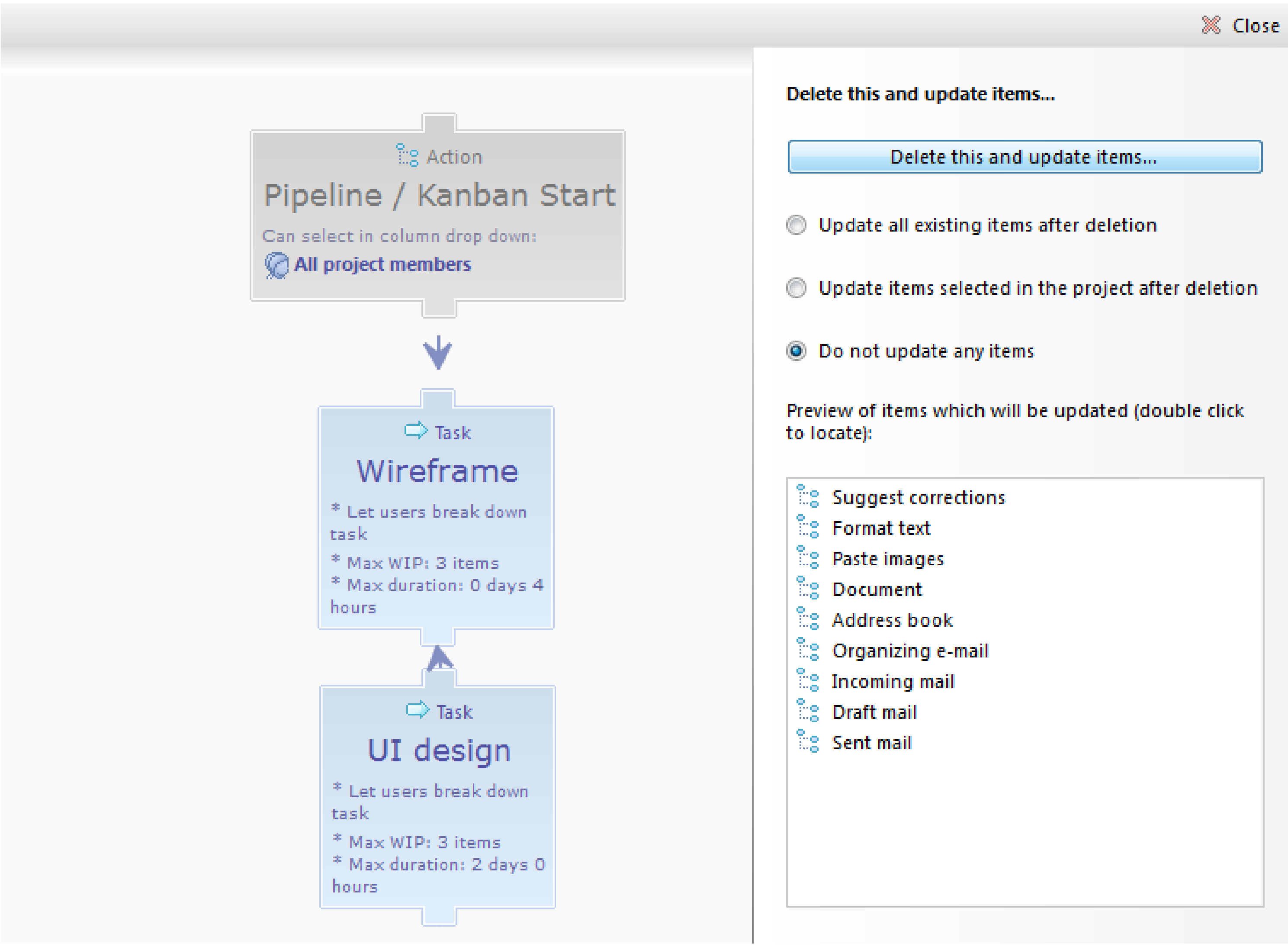
After you have edited a pipeline you have the option to update items in the project view and backlog with these changes.

You can update all existing items, selected items or only apply the changes to new items.

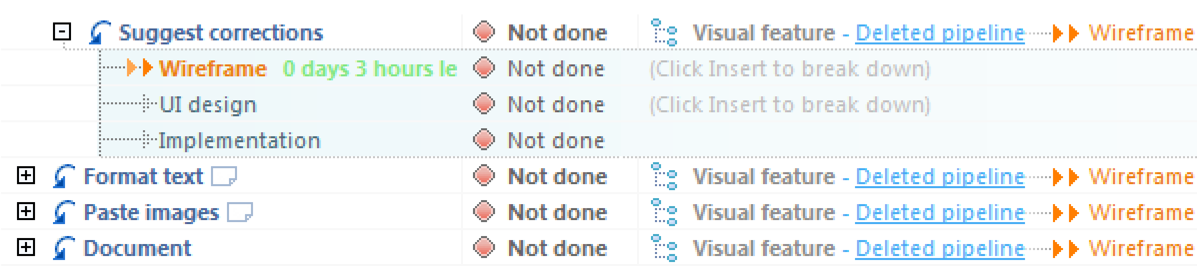


If you do save your changes and not update items they will have a hyperlink 'Old version' to the right of the pipeline name. Clicking this you can either update to the latest version or view the old version of the pipeline:

Likewise, if you delete a pipeline you will have the option to update items:



Leaving items without updating them will result in a 'Deleted pipeline' text hyperlink where you can choose to delete pipeline again and update items:



Pipelines in the product backlog

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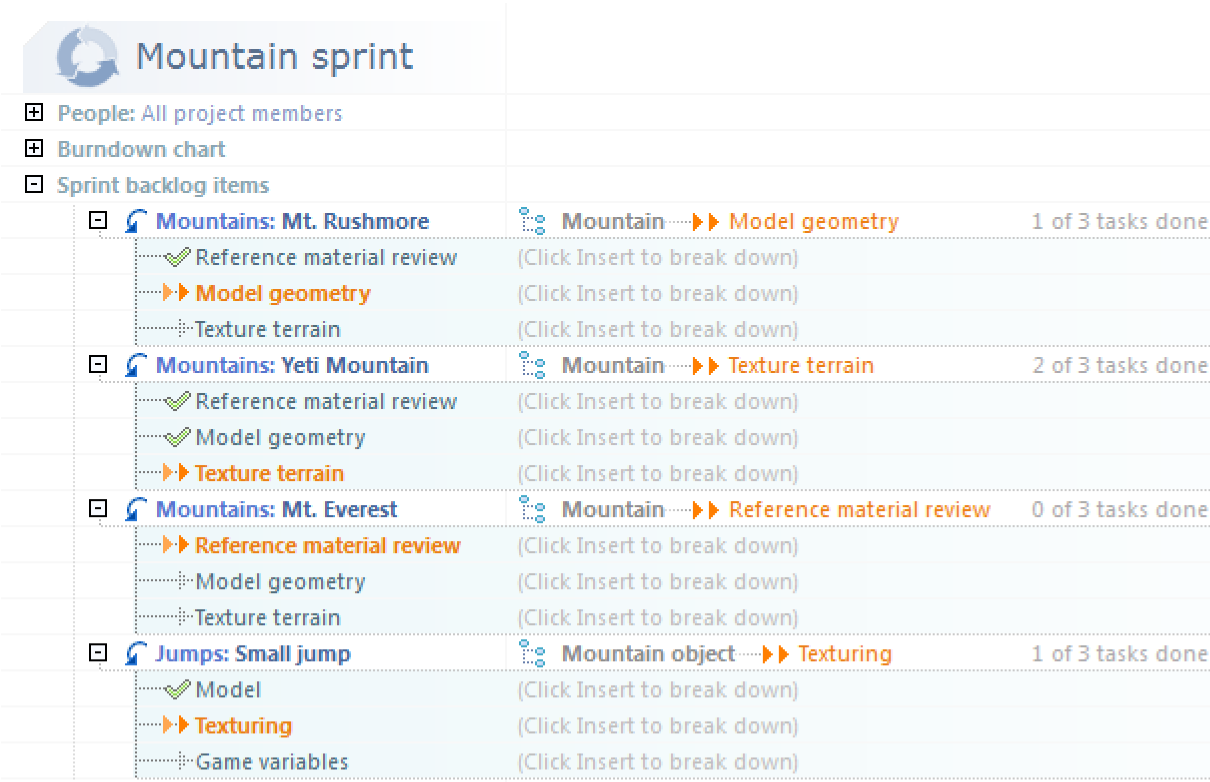
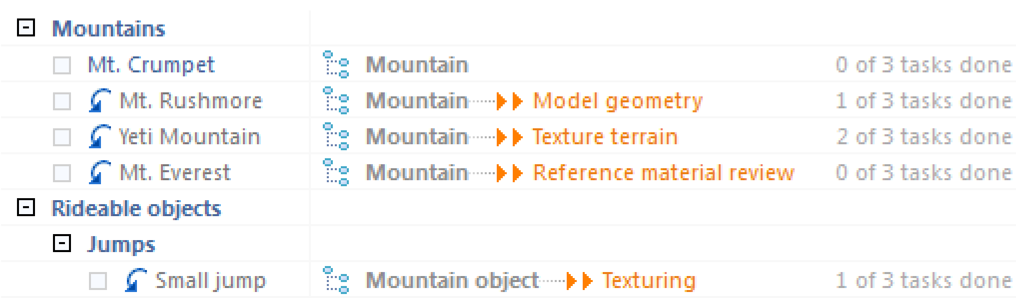
While in a sprint, items with a pipeline will appear with all the steps visible as individual rows.



Pipeline tasks in a sprint

In the product backlog, on the other hand, pipeline items will appear as single-row summaries. The backlog is intended to provide a more aggregated view, not primarily dealing with individual tasks.



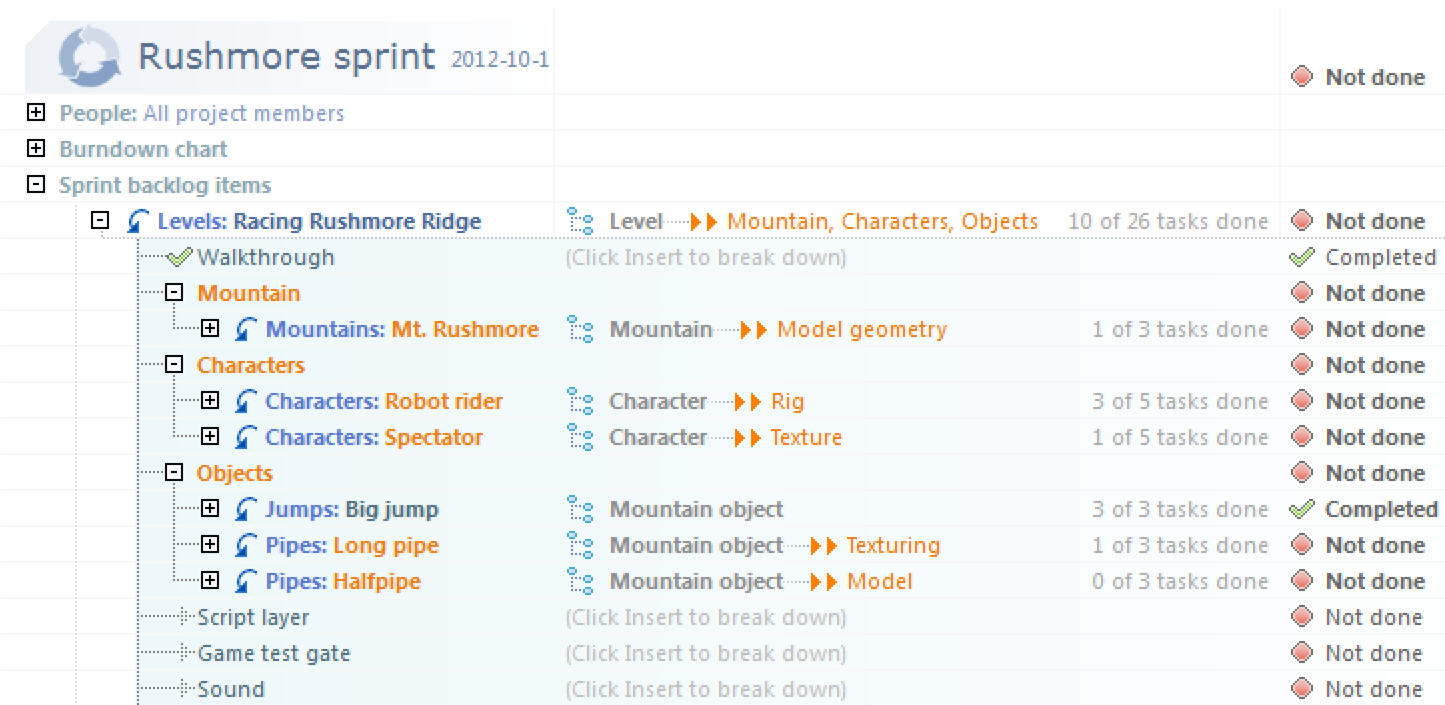
Pipeline tasks in the backlog

By viewing the product backlog through the Priority view, which normally sorts items on their Product backlog priority, items can also be sorted on their pipelines. This is a convenient way of tracking how different pipelines are progressing, as the items will be sorted first whose pipelines have further progression.

Item name	Product backlog priority	Pipeline, Kanban or Workflow	
Jumps: Small jump	High priority	Mountain object ▸▸ Texturing	1 of 3 tasks done
Pipes: Long pipe	Low priority	Mountain object	0 of 3 tasks done
Jumps: Big jump	Medium priority	Mountain object	0 of 3 tasks done
Pipes: Halfpipe	Medium priority	Mountain object	0 of 3 tasks done
Mountains: Yeti Mountain	Very high priority	Mountain ▸▸ Texture terrain	2 of 3 tasks done
Mountains: Mt. Rushmore	Medium priority	Mountain ▸▸ Model geometry	1 of 3 tasks done
Mountains: Mt. Everest	Medium priority	Mountain ▸▸ Reference material review	0 of 3 tasks done
Mountains: Mt. Crumpet	Very low priority	Mountain	0 of 3 tasks done
Characters: Female rider	High priority	Character ▸▸ Rig	3 of 5 tasks done
Characters: Male rider	High priority	Character ▸▸ LOD step	2 of 5 tasks done
Characters: Yeti	Medium priority	Character ▸▸ Texture	1 of 5 tasks done
Characters: Spectator	Low priority	Character	0 of 5 tasks done

Backlog priority view sorted by pipeline

Items in the product backlog can be committed to a part of a pipeline that allows breaking itself down into sub-pipeline tasks. This further highlights the differing purposes of the backlog and the project view: The backlog is for tracking progress on high-level goals or assets, while the project view is for contextualizing that work for the team.



Pipeline items commited as steps in a larger pipeline

Kanbans

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Working with Kanbans

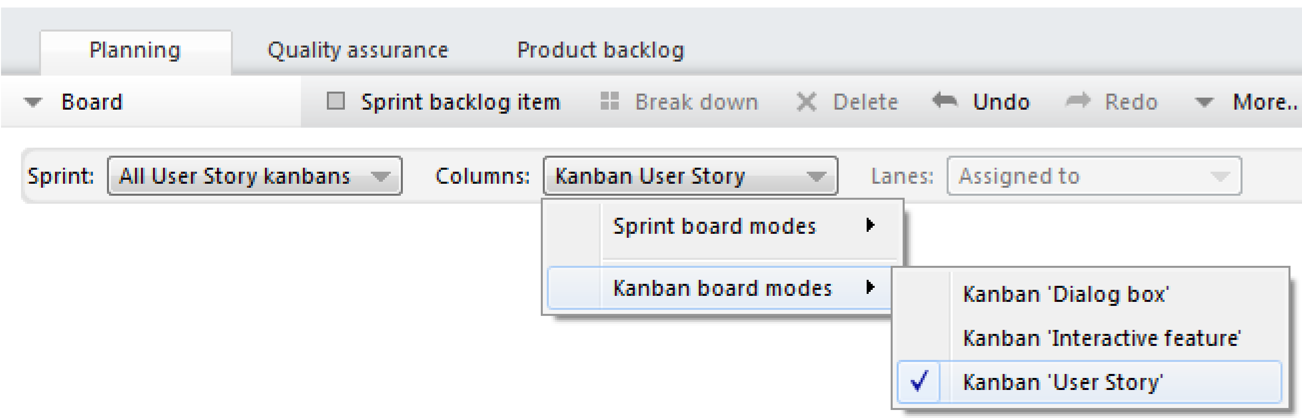
The Kanban wall view is a powerful visualisation of pipelines and has the unique functionality to handle parallel workflows.

Before entering this view you must first create a kanban.

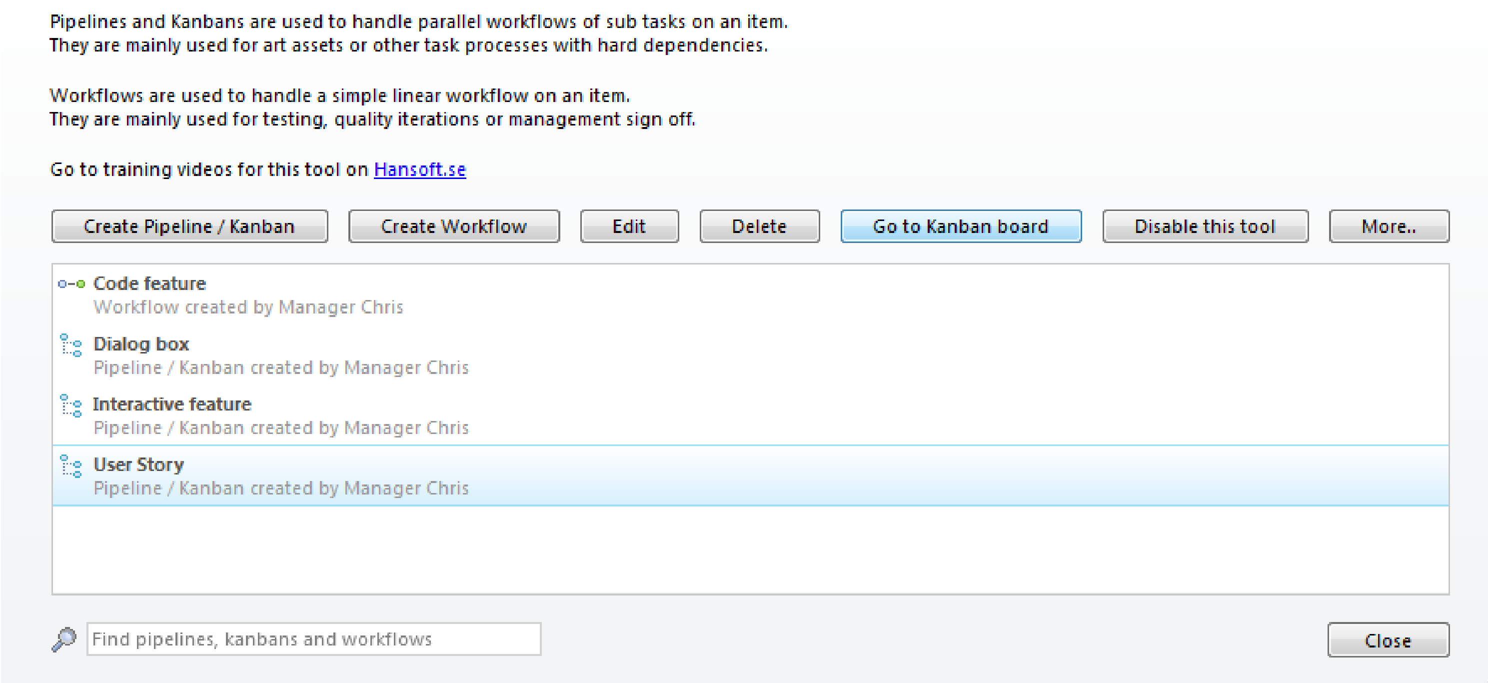
Accessing the Kanban view

The Kanban view can be accessed in two ways:

1) If you go to the wall view and then select a Kanban wall mode:



2) If you go to the Pipelines, kanbans & workflows window you go can go to the wall view directly:



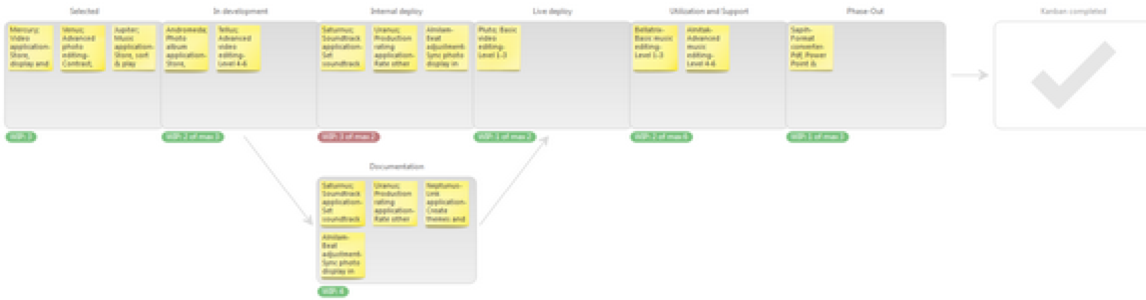
Working with the Kanban view

The Kanban view displays each step in the Pipeline / Kanban in a horizontal structure based on the dependencies within the Kanban.

- By dragging each Kanban item forward you complete a step in that Kanban.
- By dragging each Kanban item backward you set a step in that kanban to incomplete.
- By dragging an item to the Kanban completed flag you complete the whole Kanban at once.

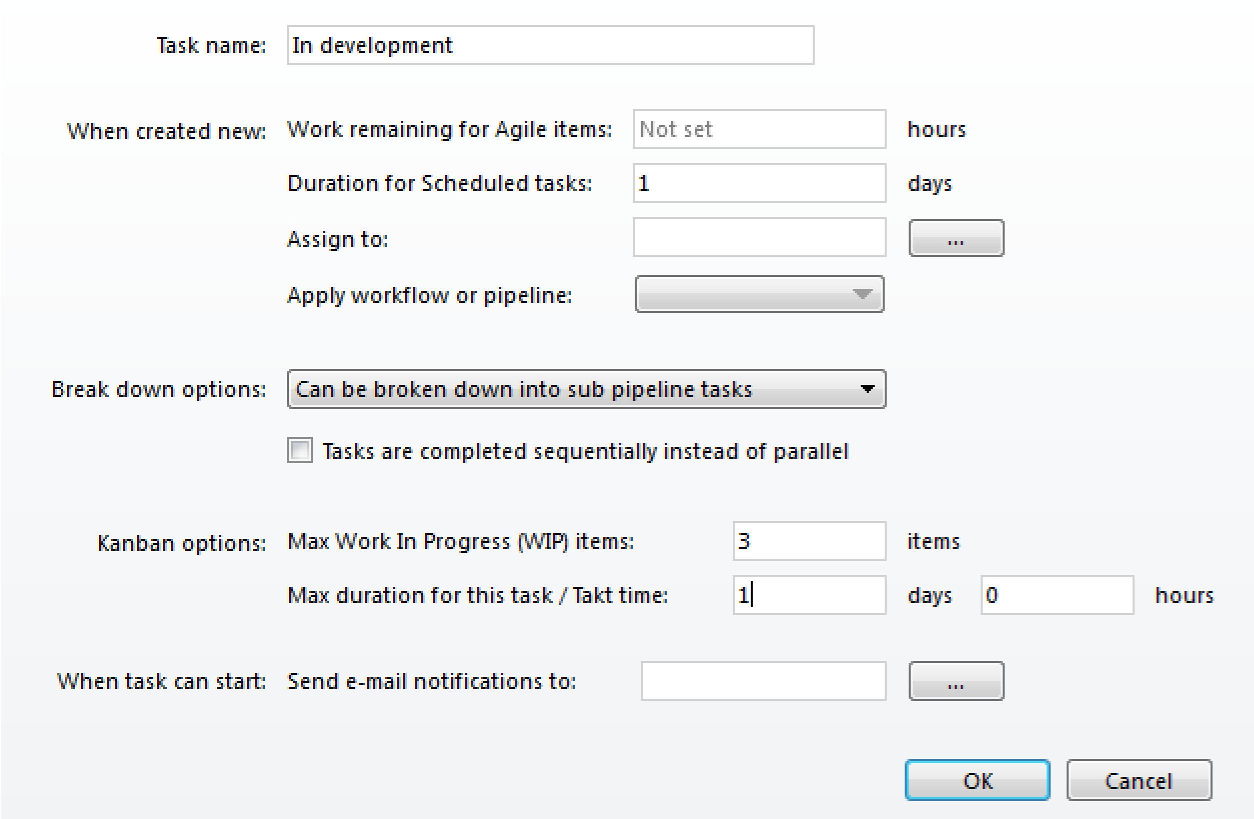
1. WIP means 'Work In Progress' and tells you how many items are ongoing in each step. This is a powerful tool to see where bottlenecks exists within a project.

If cards turn red instead of orange they are overdue, this is decided by Takt time / Max duration for this task which can be set on each step in the Kanban.

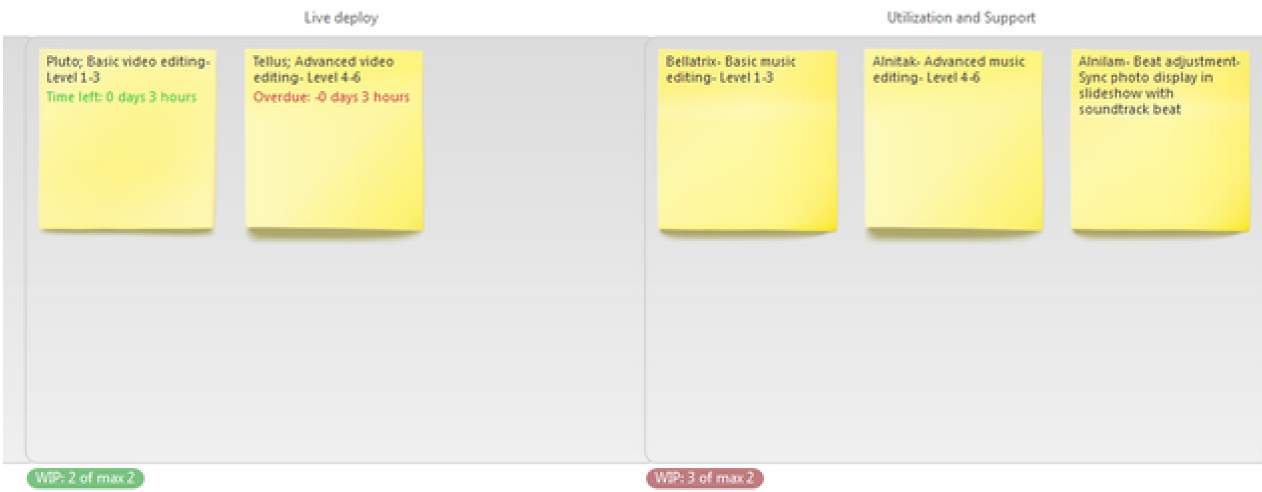


Kanban options for WIP and Takt time

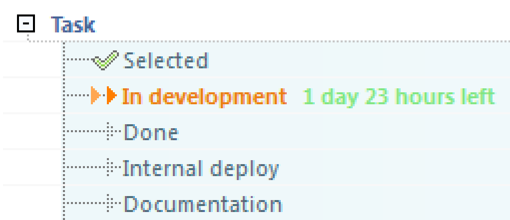
Two core Kanban options are available on a Kanban step: WIP (Work in Progress) maximum and Takt time / Max duration for this task



Setting them have this effect in the Kanban view, WIP turns red if there are too many items in that step and orange cards turns red if they are overdue in Takt time:



Takt time is also available in the Schedule view.



Workflows

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Workflow fundamentals

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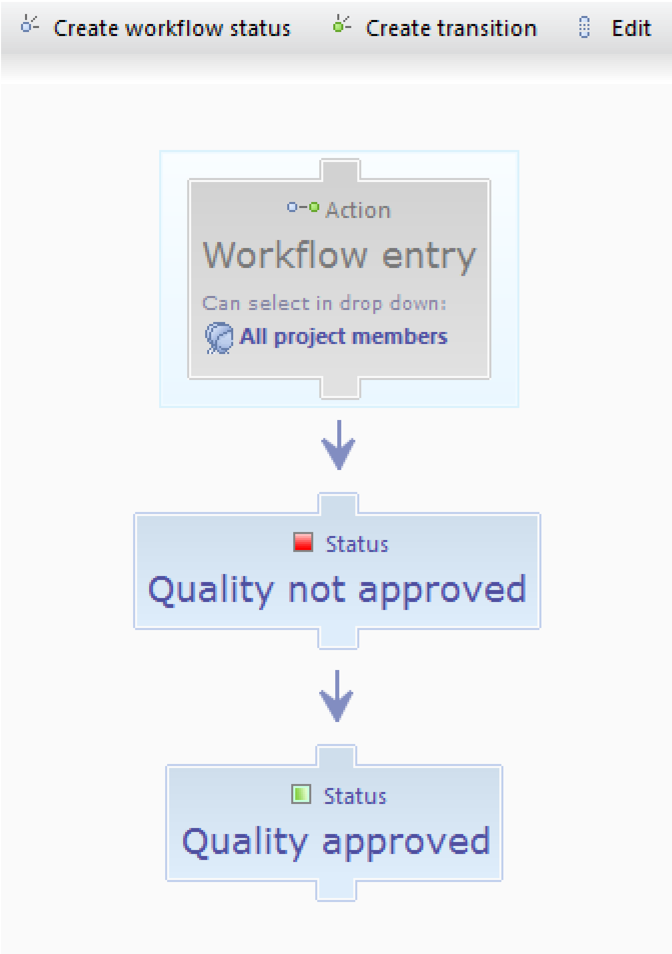
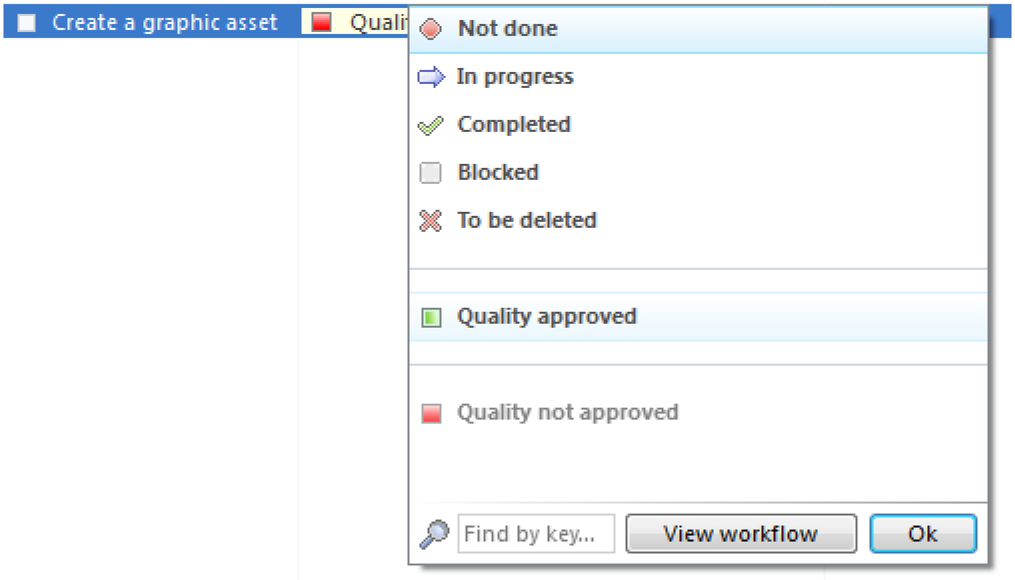
A workflow is used to define the life cycle of a task. In contrast to pipelines, a workflow is applied to a single task, as opposed to spawning a sequence of tasks. Workflows are mainly used for task sign off, user story testing, art sign off or quality iterations.



A simple workflow for a task which involves approval of quality

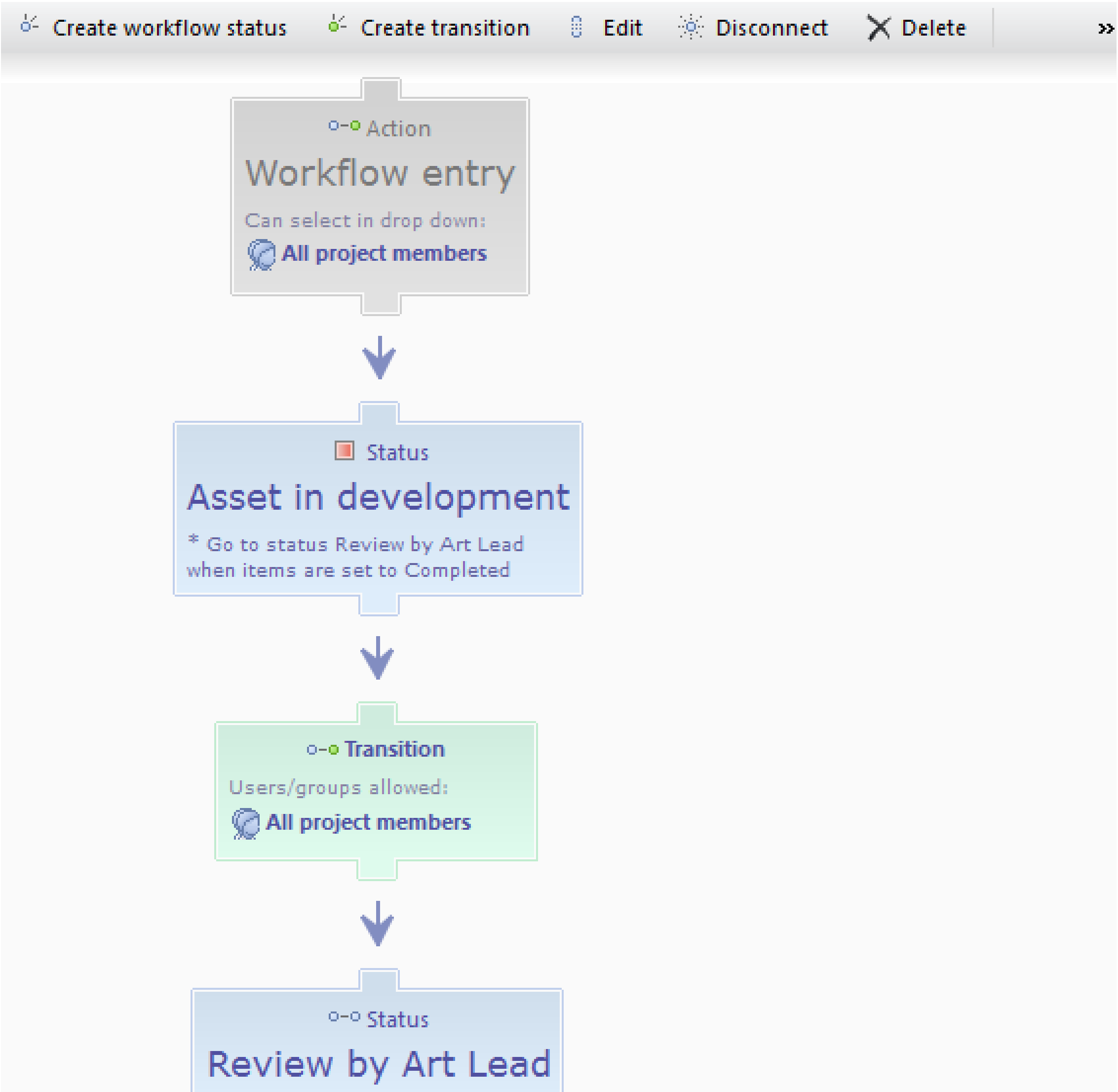
Setting a workflow on a task automatically progresses the workflow to the first workflow state. Going to the next status can be done manually, or can be triggered by changing the item status of the underlying item. Double-clicking the Status column will display a list of valid Item statuses, and workflow states, to which the item can progress.



Moving to the next state in a workflow by double-clicking the status column

Building a workflow

You build a workflow by inserting statuses and transitions shown here on the toolbar when editing.



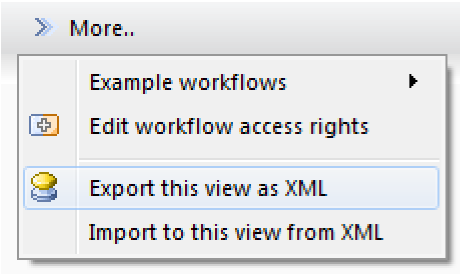
Editing a Sign-off workflow

Workflow status settings

Jump to the next chapter if you want to know more about workflow status settings.

Exporting and importing workflows

Under the More menu you can export and import your workflows as XML. This is useful when transferring work-flows between projects or databases.



Exporting and importing a workflow through the More menu

Workflow access rights

Users or user groups can be allowed to alter a workflow beyond the defined restrictions, giving them permission to edit the full item. This capability is set through the option Edit workflow access rights in the More menu.

For examples on using Workflow access rights, read Using workflows for testing user stories.

Workflow transitions

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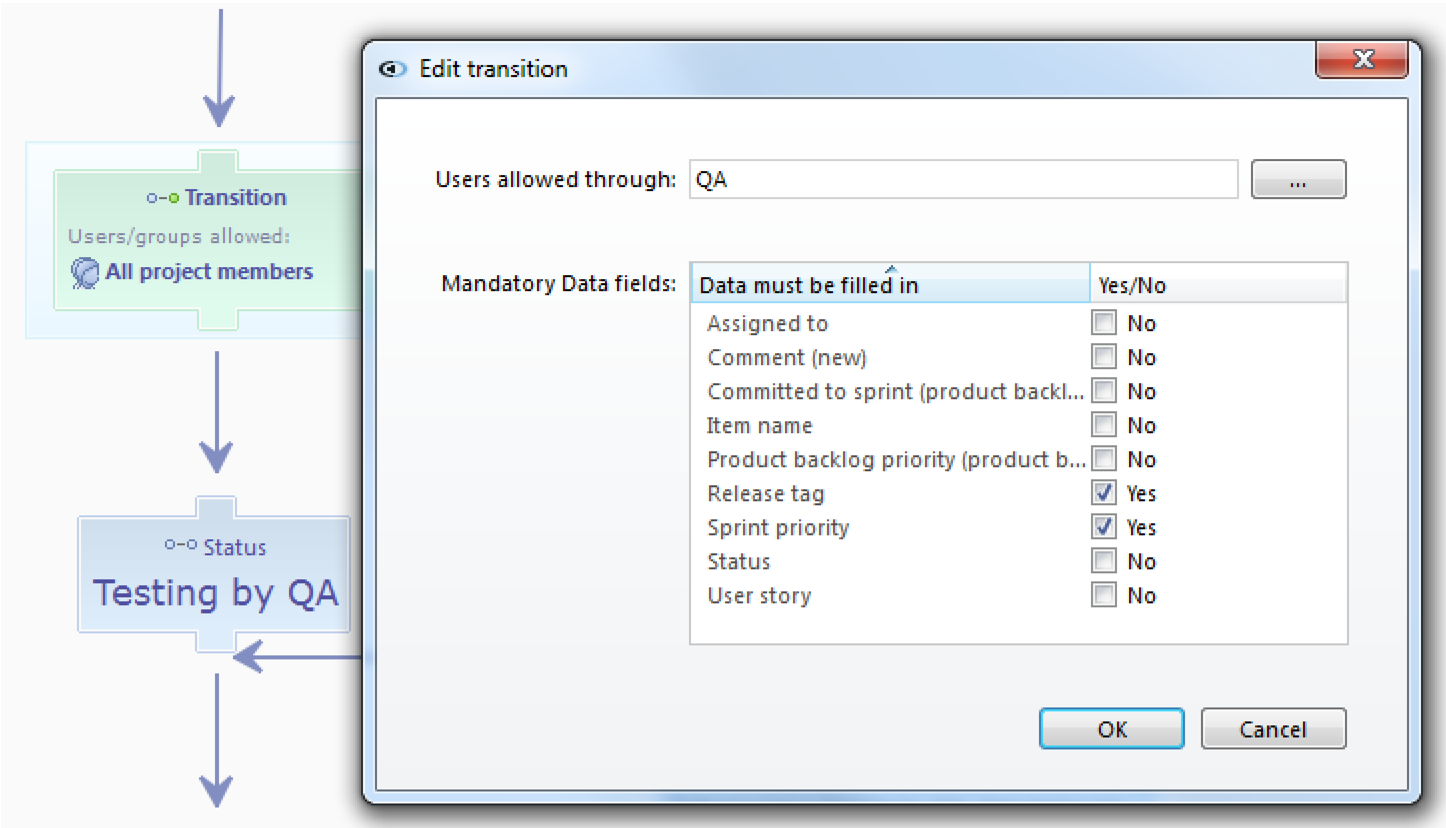
A workflow transition limits who can do the transition from one status to the next. You can also decide what data fields that must be filled in before going to the next workflow status.

In the example below, going from User story in development to Testing by QA can only be done by the user group

QA Testers.



Defining allowed users in a workflow transition

Workflow status settings

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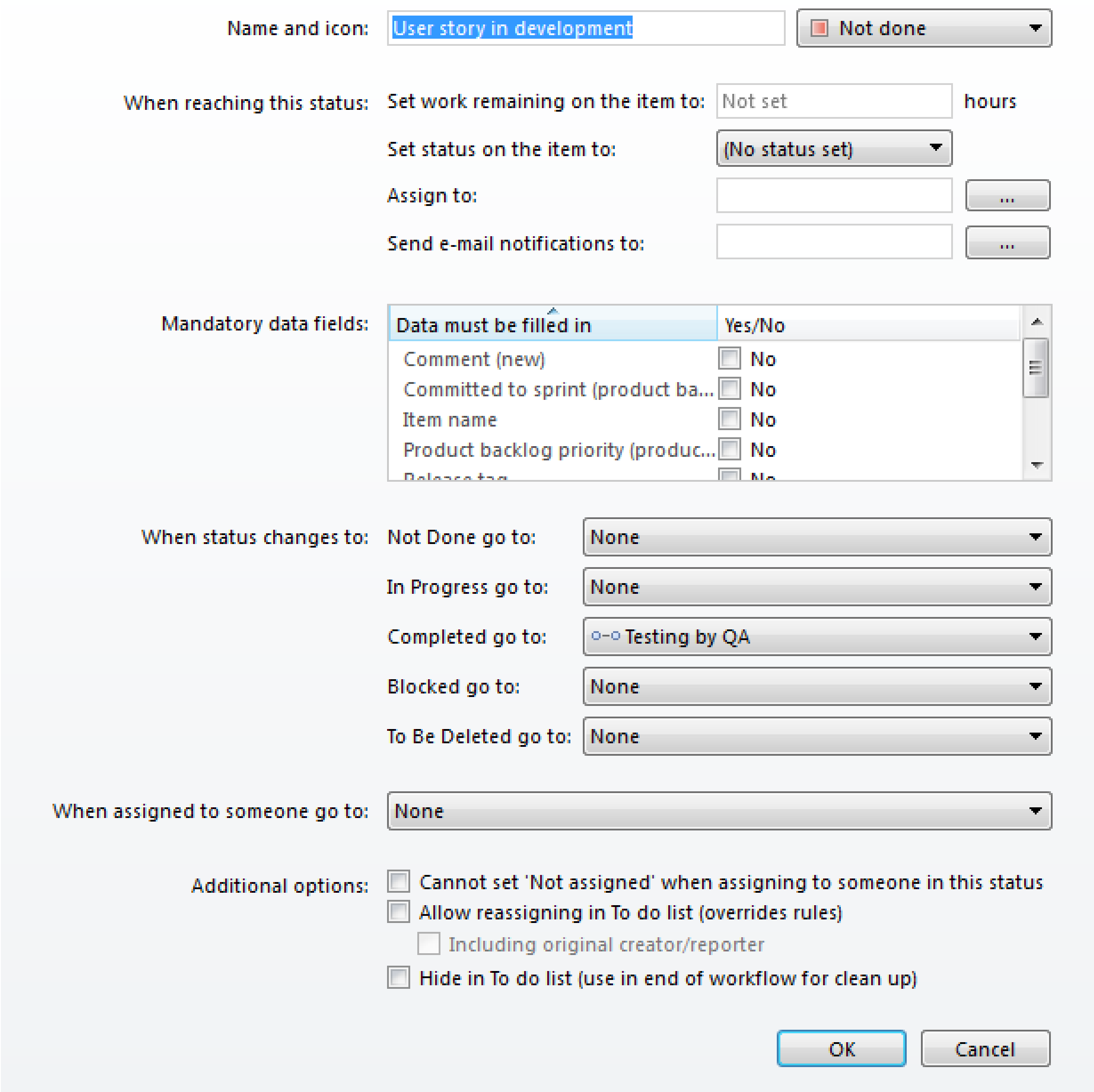

Workflow status settings dialog

On a workflow status you have these options:

Basics

- Selecting a status name and icon.
- Select which data a user must fill in before leaving this status (for example, a comment must be written).

When reaching this status

Setting work remaining to X hours. Useful for quality iterations (alpha, beta or gold quality where each stage resets work remaining).

Assigning to users/group. For example auto assigning to user group QA Testers when reaching a testing stage in the workflow.

Sending E-mail notifications to users/groups. For example sending a mail when reaching status "Testing completed" to managers.

Settings item status (affecting both agile and scheduling items) to not done or completed. Useful in a "Testing failed" status when the item is reassigned to the user who was assigned to do the task in the first case before testing begun.

Additional options

Go to this workflow status when the item is assigned to someone.

Cannot set 'Not assigned' when selecting a user in this status. Useful when users want to reassign the item to someone else. They should not be able remove all users from the item.

Let assigned users reassign the item to someone else in their To do list. Useful when a user thinks that another co-worker is better suited to perform the task.

Go to selected workflow status when the item is set to 'Completed'. Useful in a testing or art review scenario. When the task is done it is for example automatically set to workflow status 'Testing by QA' and assigned to different testers.

Default workflow for newly created tasks and items

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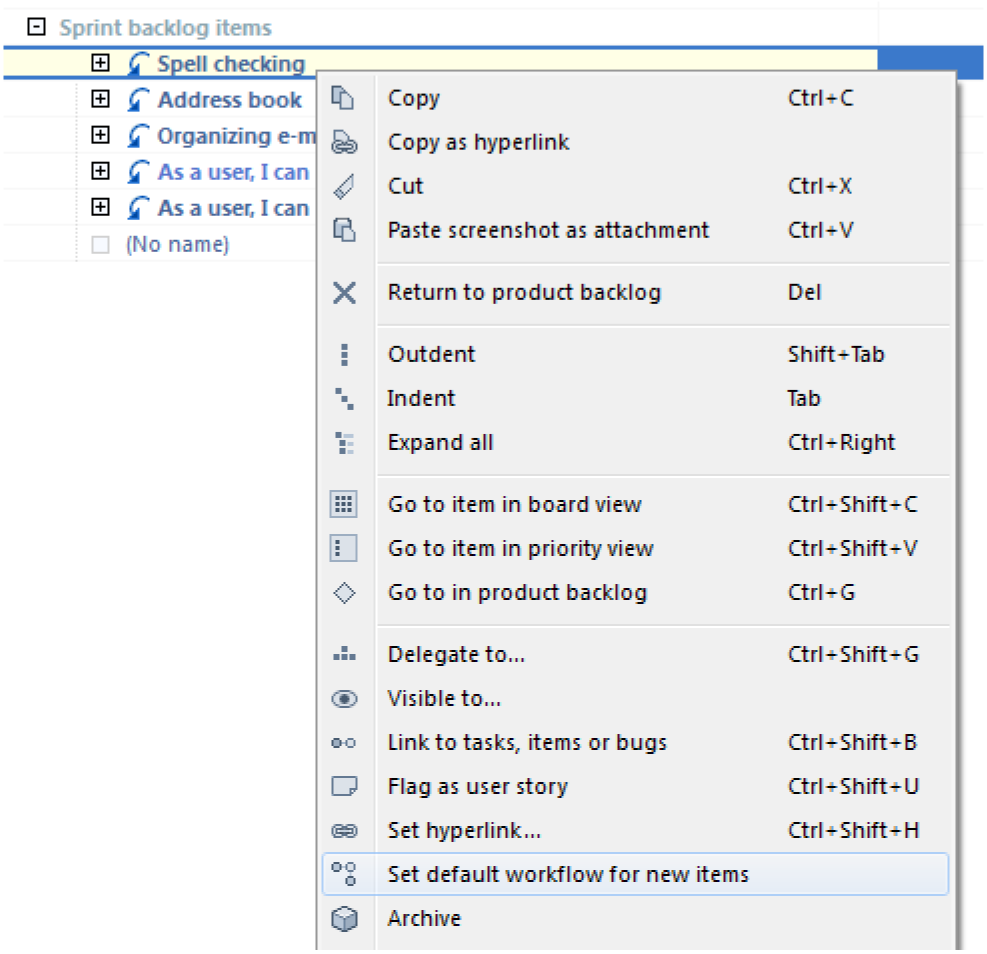
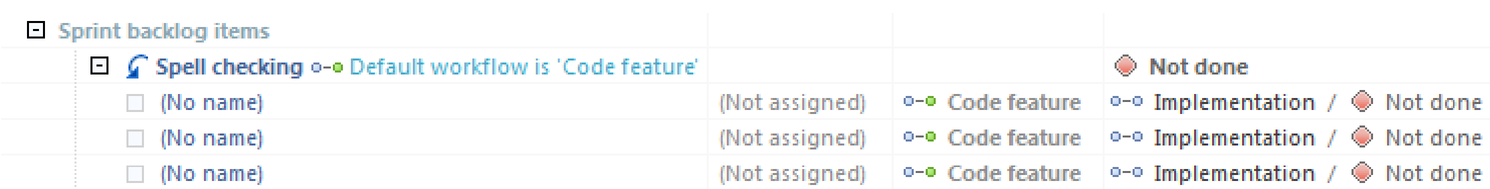
Setting a default workflow for newly created tasks and items is a good practice since it can enforce the correct process to take place (when a task is done, go to testing for example).

To set default workflow for new tasks, right-click on a subproject or sprint and select Set default workflow for new items.



Setting the default workflow for new items



New items having inherited the default workflow from their parent subtask.

Workflows in the To do list

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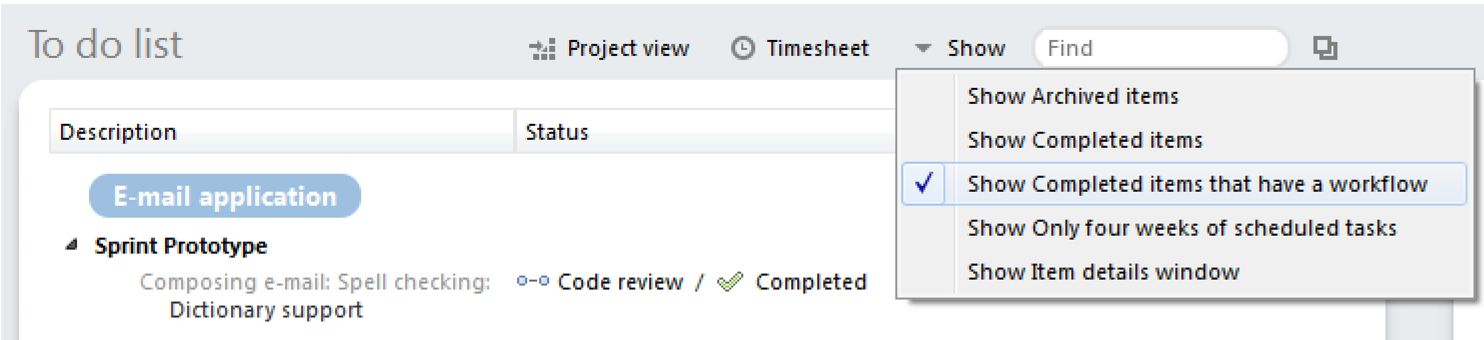
In the To-do list, an option can be enabled to always show items that have a workflow applied to them, even if their item status is set to Completed. This is to enable the item to be tested, reviewed or otherwise signed off where it would normally be hidden from the To do list.



Workflow on a pipeline task

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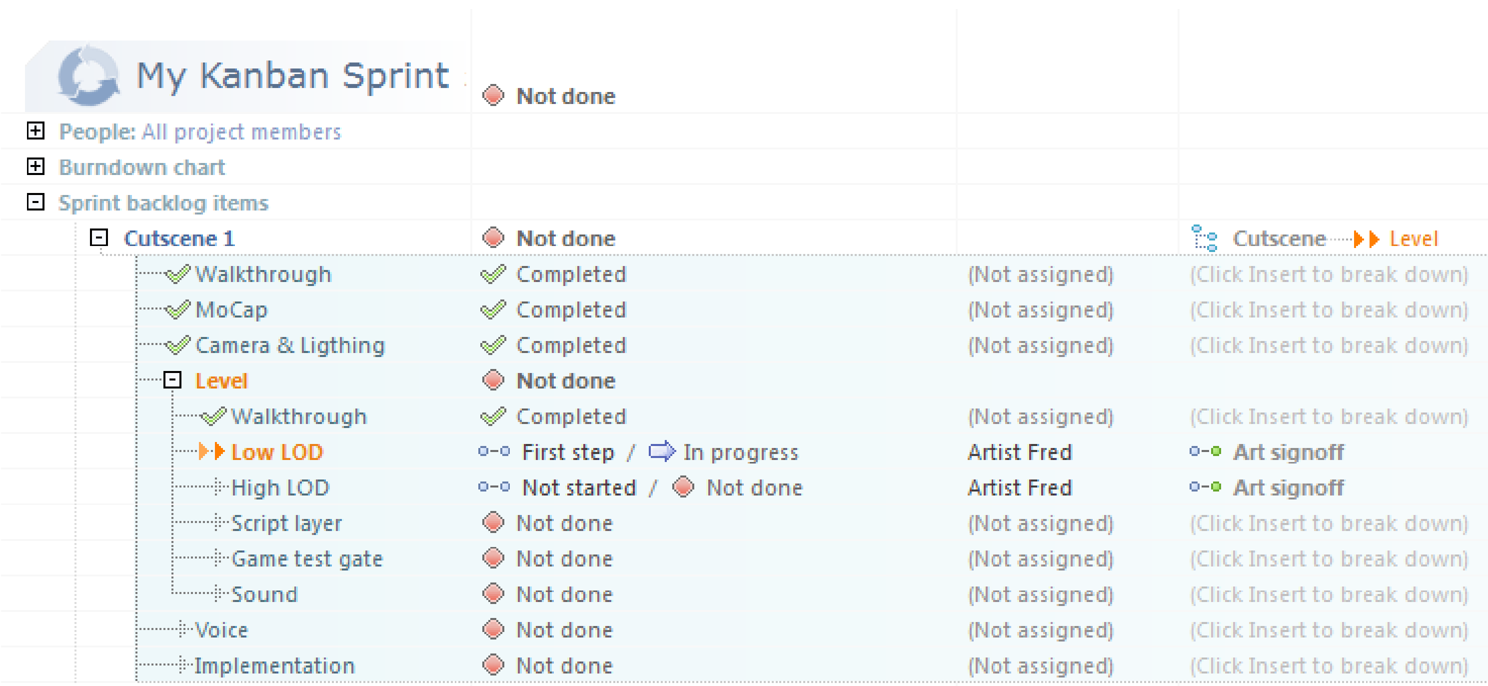
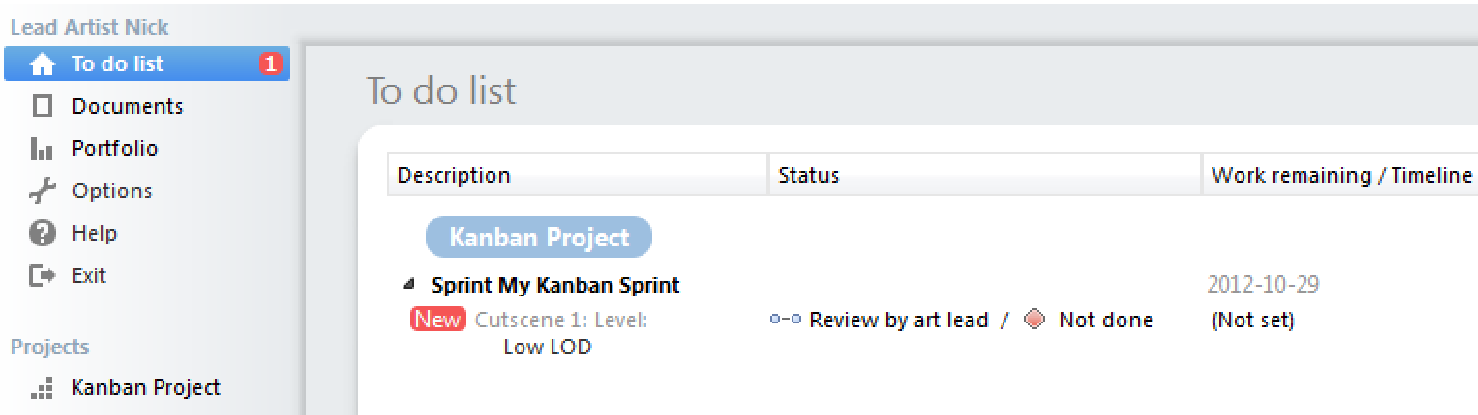
In a pipeline you can choose to have a workflow on a pipeline task. The strength of workflows is particularly apparent when combined with pipelines, providing a birds-eye view of the status of a pipeline.

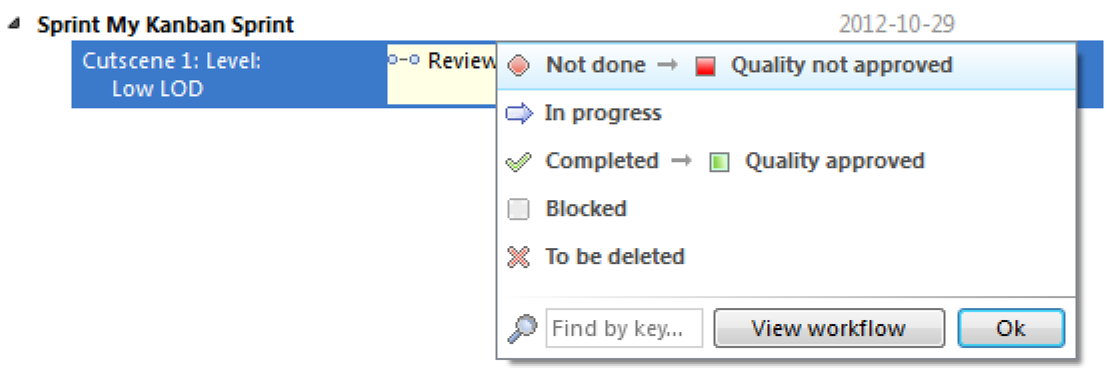
In the following example, an art Sign off workflow has been select on pipeline tasks 'Low LOD' and 'High LOD'. The Low LOD step, when completed, will be assigned to the art lead for review.



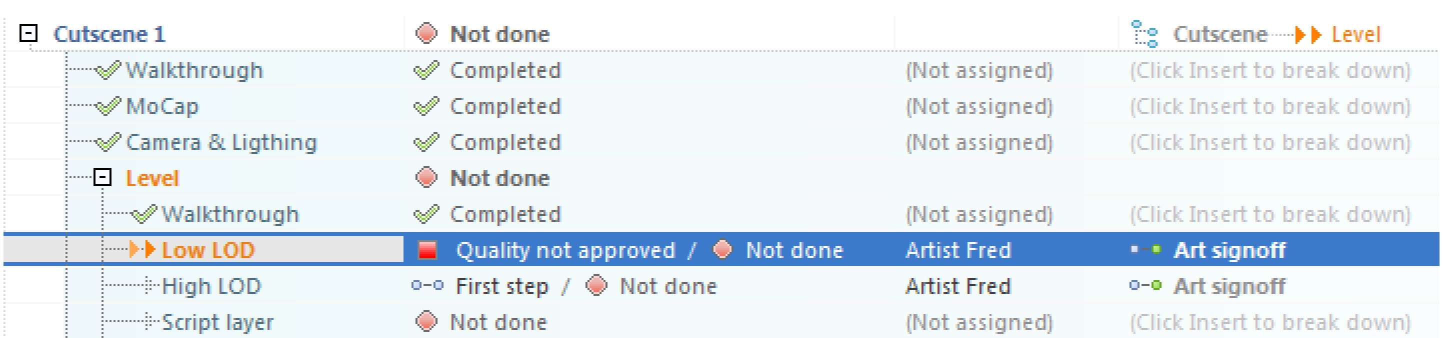
The art lead now has the task in their To do list, ready for review.



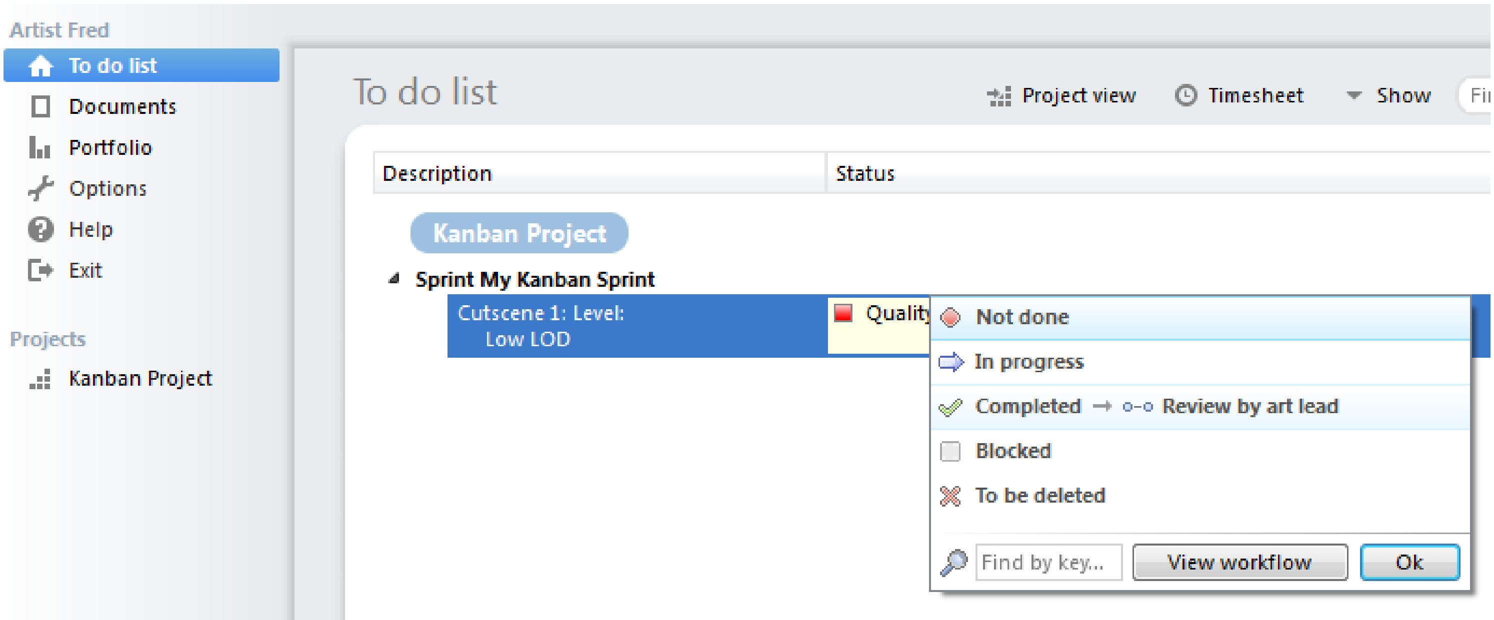
The art lead can choose to either approve or disapprove of the quality of the task. As per how the workflow was designed, Quality not approved will send the task back to the artist for further work.



In the project view the pipeline indication will now revert to 'Low LOD' and 'High LOD' because the quality was not approved (and the item was set to Not done). This will re-assign the task to the artist.



The artist again has the task in their To do list.



This review loop can continue indefinitely until the art lead sets the task to "Quality approved."

Using workflows for testing user stories

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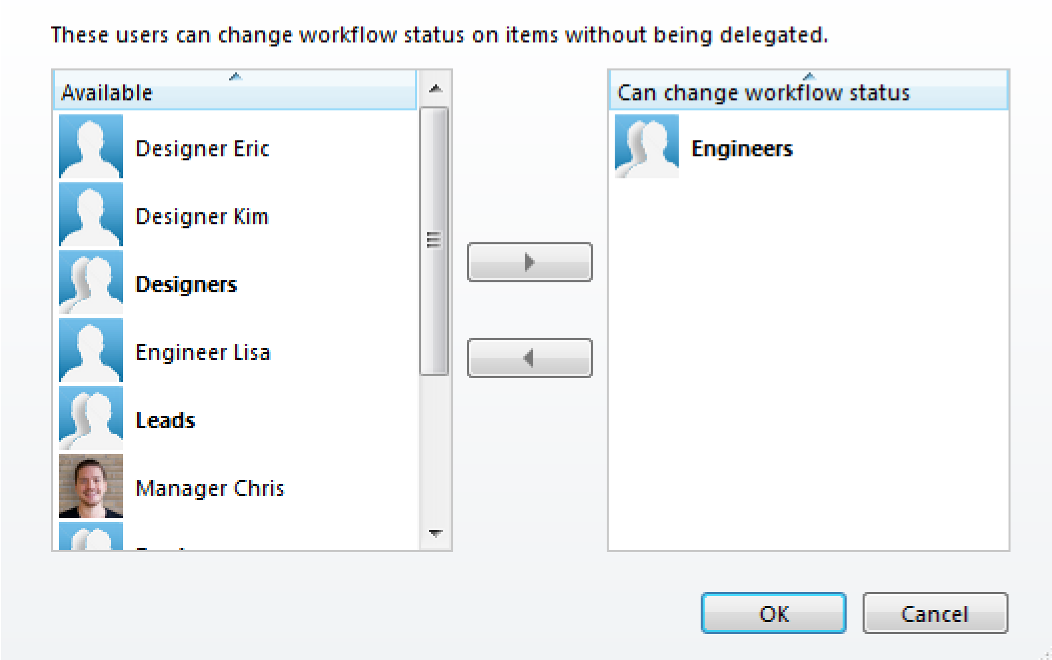
You can use workflows for testing completed tasks and user stories without delegating parts of the project or backlog.

This is useful when you want a group of testers to test user stories in the backlog without being able to change any property of the user story itself.



Setting access rights on workflow status

Example workflows

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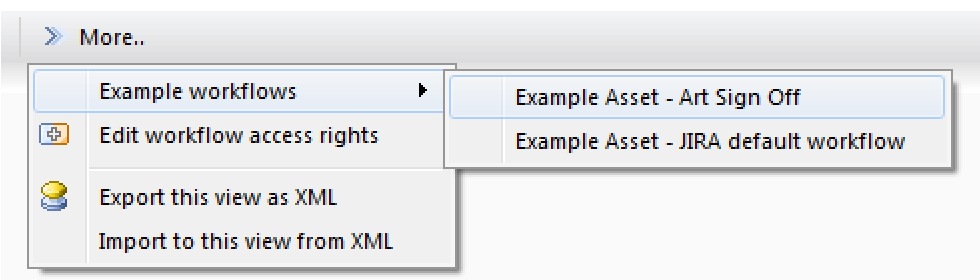
To quick start the use of workflow you do always have access to built in examples under the More menu when editing a workflow.

Both the 'Art Sign Off' and 'User Story Testing' workflows are important examples on how to use Hansoft workflows in review processes involving multiple co-workers.



Fundamentals

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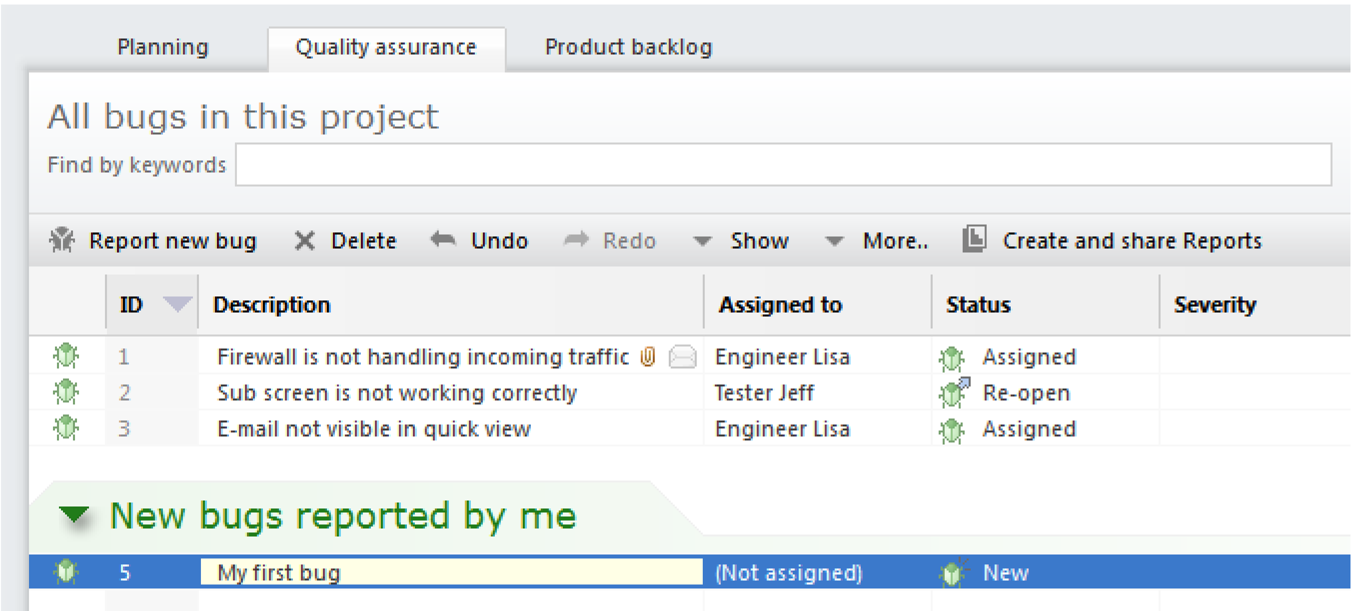
Hansoft has full support for Quality Assurance (QA). QA in Hansoft is integrated with the project side, allowing co-workers to see schedule & agile tasks and bugs alongside one another in their To do list. Hansoft offers extensive functionality to customise workflow, add extra columns etc. This is covered in later sections of this help manual.

QA is handled under the "Quality assurance" tab.



Reporting and editing bugs

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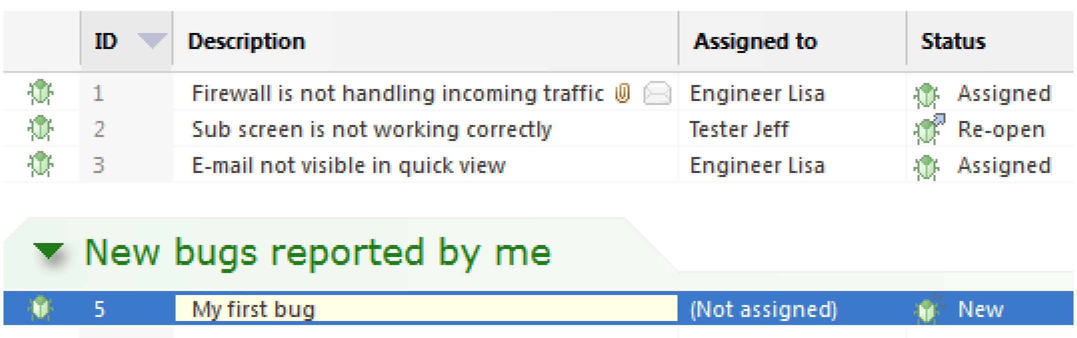
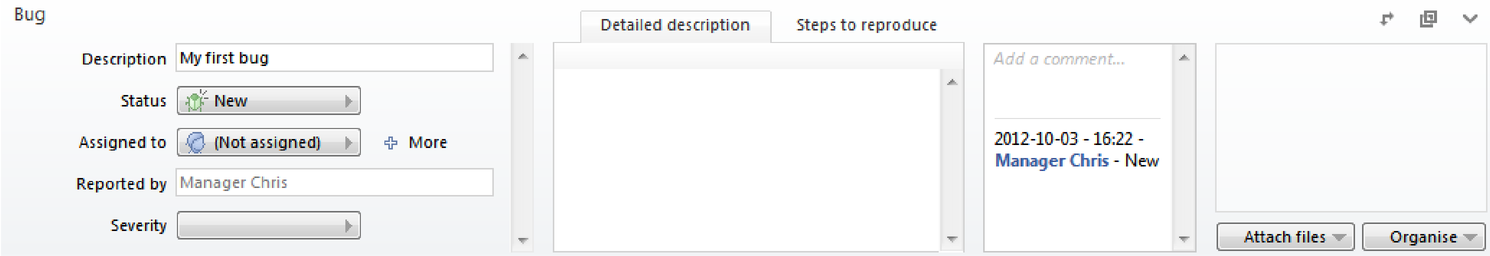
To report a bug in Hansoft, click on Report new bug or press Ctrl + N (Cmd + N):

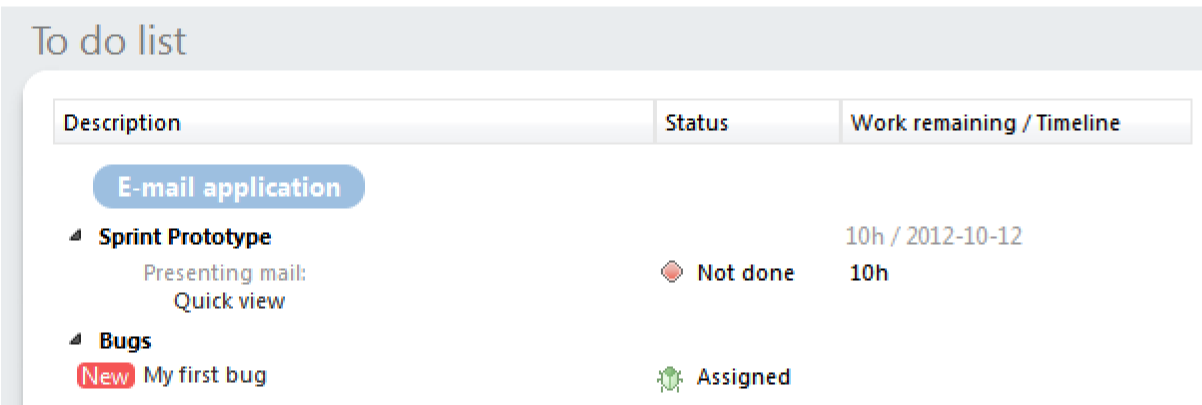


To edit a bug in Hansoft, utilize the bug details window. Here you can set all the bug data in all columns, add detailed description, steps to reproduce and comments:



Please note that you can use html tags such as <bold> and </bold> or <URL=www.hansoft.se>Hansoft</URL> on comments, detailed description and steps to reproduce.

When bugs are reported, they will pop up as new bugs in the assigned user's To do list.



Bug workflow statistics

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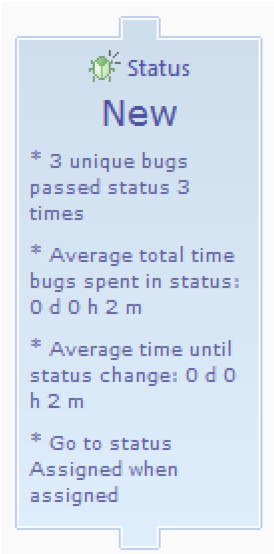
You can analyze how many bugs pass through a bug status and how long they remain in that status.

This can give useful information with regard to how long it takes for a bug to be fixed or verified. In other words, this functionality can identify potential bottlenecks in the quality assurance process.

Go to the bug workflow and press Show status statistics on the toolbar:



Bug workflow

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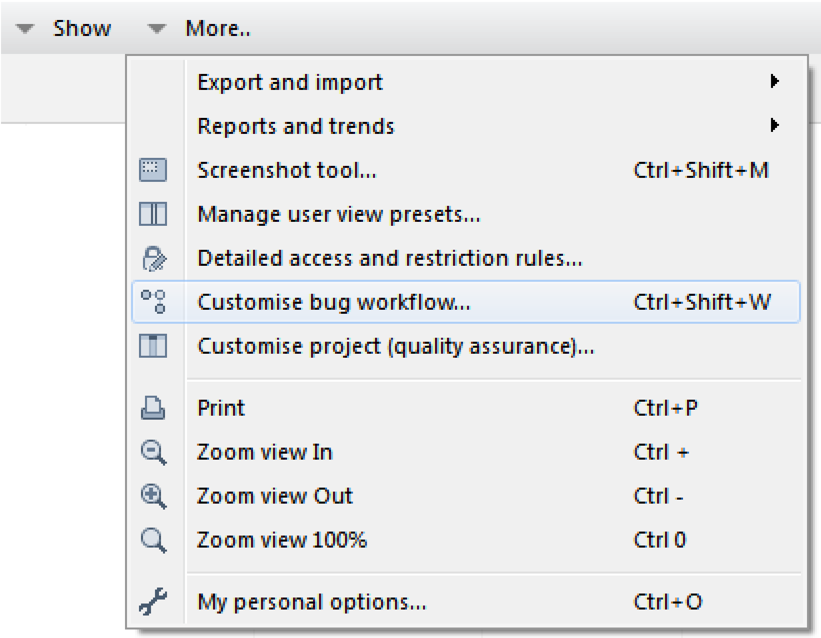
One of the most fundamental parts of Hansoft QA is the bug workflow. The bug workflow is unique for each project and is fully customisable. Each and every bug is bound to the workflow and only "Main project managers" can override it.

The bug workflow

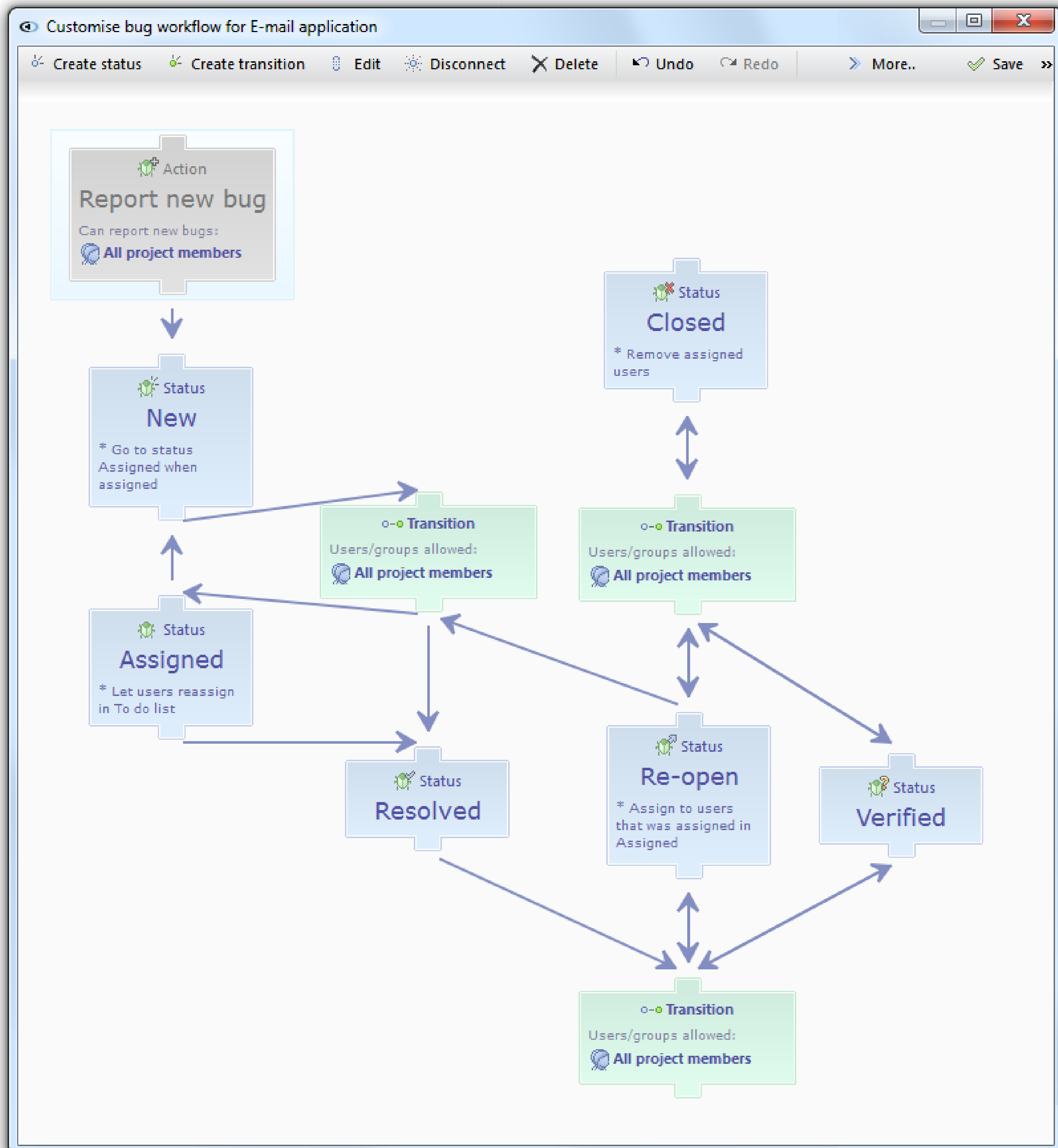
The bug workflow decides:

- Which bug statuses there are ("New" or "Assigned" or "My own bug status") and their visual appearances
- How the bug workflow is progressing (going from "New" to "Assigned" and from "Verified" to "Closed" for example)
- Who can report bugs
- Who can go from one bug status to another (only user group "QA Testers" can go from "Resolved" to "Verified" for example)
- Auto assigning bugs to an individual or user groups (such as user group "QA Testers" for example) when reaching a bug status
- Forcing users to enter bug status before progressing in the workflow
- Notifications to users/groups when a bug reaches a status (for example, user group "Project managers" should receive an E-mail when a bug reaches status "Closed")

To view the bug workflow, go to More and View bug workflow.

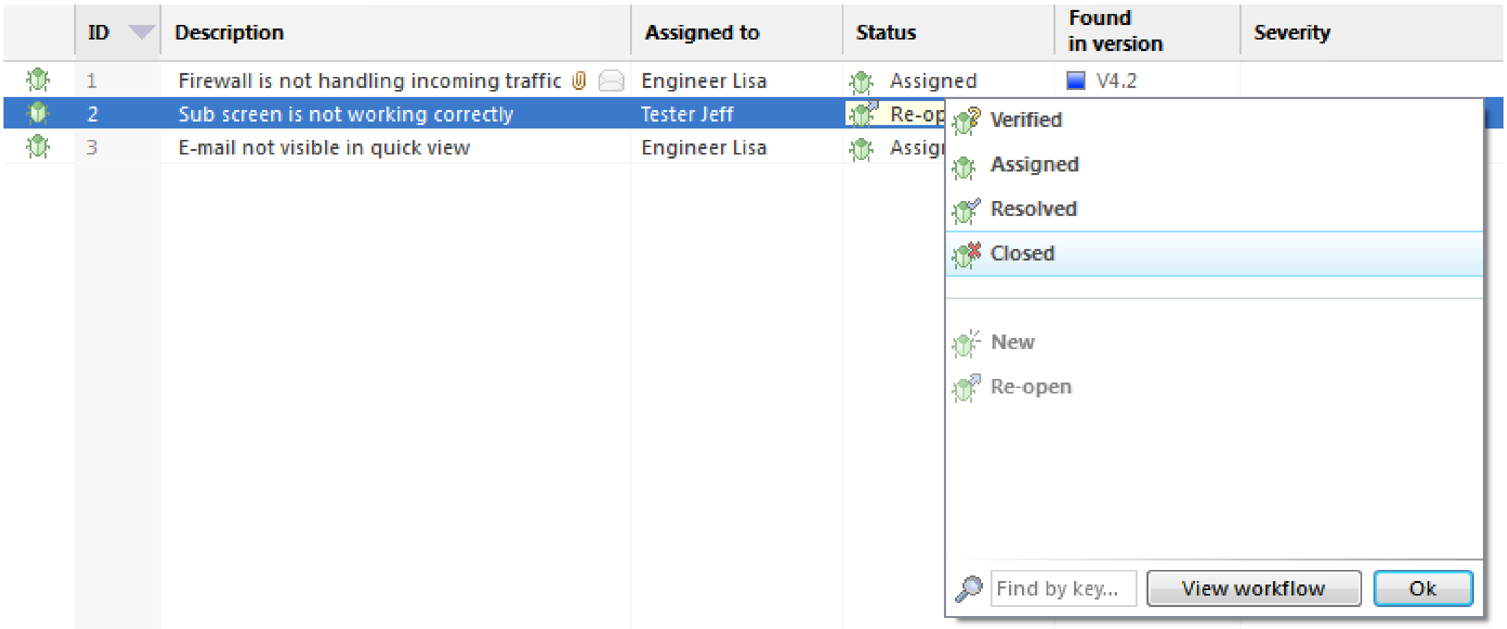


Now you will be presented to the bug workflow of this project. In every blue box, you can see the statuses that a bug can have, and the green boxes limit those who (as in users) can proceed from one bug status to another ([to customise the workflow, click here]()):

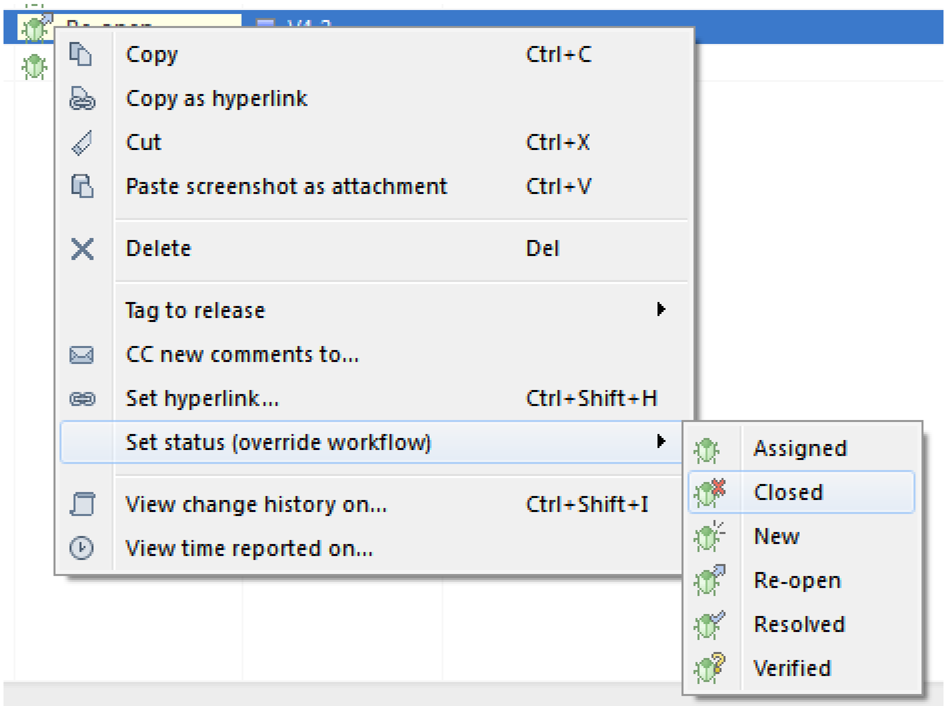


Customise bug workflow for E-mail application
Create status
Create transition
Edit
Disconnect
Delete
Undo
Redo
More..
Save
Action
Report new bug
Can report new bugs:
All project members
Status
New
* Go to status Assigned when assigned
Transition
Users/groups allowed:
All project members
Status
Closed
* Remove assigned users
Transition
Users/groups allowed:
All project members
Status
Assigned
* Let users reassign in To do list
Status
Resolved
Status
Re-open
* Assign to users that was assigned in Assigned
Status
Verified
Transition
Users/groups allowed:
All project members

To proceed with the bug workflow, users click on the bug status in the bug list or in the bug details window. Note that only "Main project managers" can override the workflow:



Main project managers can also override the bug workflow by right clicking on a set of bugs and selecting "Set bug status (override workflow)":



Customising bug workflow

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Changing the bug workflow

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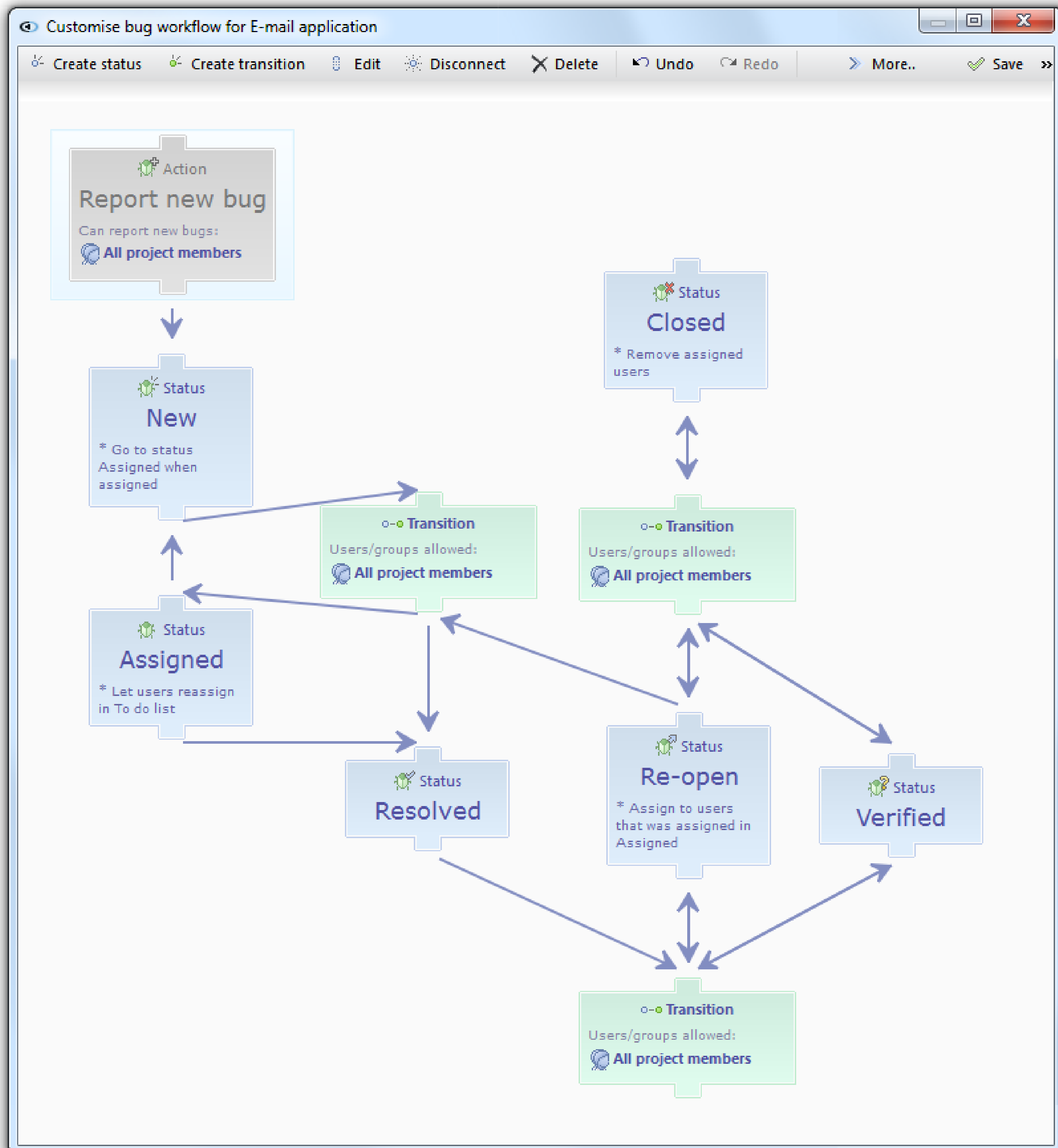
To customise the workflow in Hansoft you either have to be a "Main project manager" or you need to have the project profile setting "Can edit all bugs" under Administration:

You customise the bug workflow by creating new bug statuses and transitions (limiting those who can go from one bug status to another) and then connecting them with arrows. Changing the bug workflow will have an instant effect on the project. The number of combinations and types of workflows you can create is not limited in any way. Much functionality in the bug workflow and in Hansoft QA in general is embedded in the bug status.

If you would like to reset the workflow back to the Hansoft original, click on "Default workflow" on the toolbar.



Customise bug workflow for E-mail application
Create status
Create transition
Edit
Disconnect
Delete
Undo
Redo
More..
Save
Action
Report new bug
Can report new bugs:
All project members
Status
New
* Go to status Assigned when assigned
Status
Closed
* Remove assigned users
Transition
Users/groups allowed:
All project members
Transition
Users/groups allowed:
All project members
Status
Assigned
* Let users reassign in To do list
Status
Resolved
Status
Re-open
* Assign to users that was assigned in Assigned
Status
Verified
Transition
Users/groups allowed:
All project members

Creating and editing a bug status

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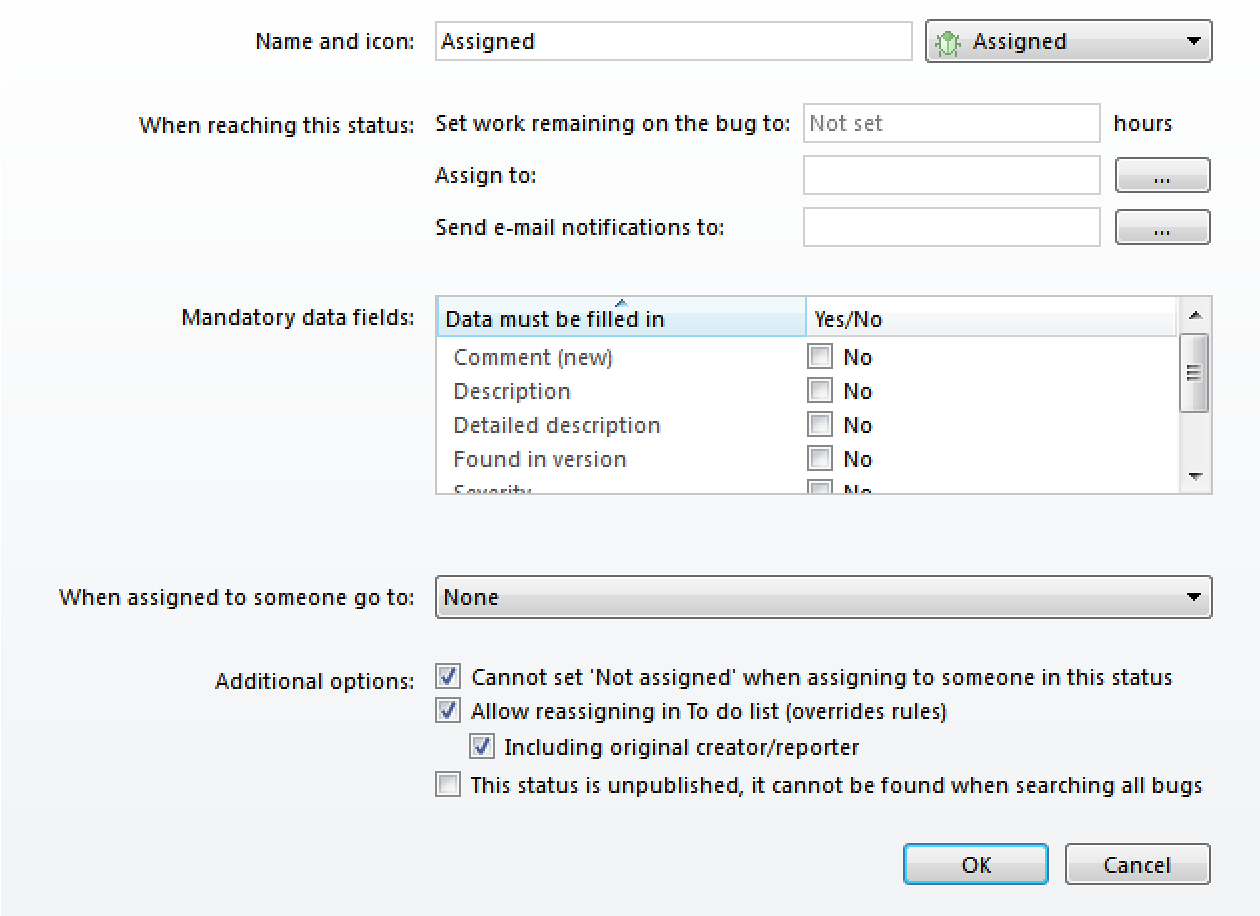
Creating and editing a bug status in Hansoft is fundamental to controlling the bug workflow.

Through the bug status you can:

- Change the visual appearance by changing icons
- When a bug reaches this status, you can auto-assign the bug to individual users or user groups (for example, by assigning the bug to user groups "QA Testers" when it reaches bug status "Resolved"). You can also chose to auto-assign to the Original Reporter directly.
- Give an extra E-mail notification to individual users or a user groups (for example, by notifying user group "Project managers" when the bug reaches the status "Closed")
- Go to another bug status when a bug is assigned to someone (for example, by going from "New" to "Assigned")
- Set that users can reassign bugs to someone else in their To do list (including the Original Reporter of the bug)
- Remove users from bugs when they reach a bug status (for example, by removing the assignment from the bug when it reaches the status "Resolved" or "Closed")
- Force bug reporters to enter bug data before going to the next bug status (for example, a new comment since last workflow change or by entering "Steps to reproduce" before setting a user or the next bug status)
- Set a flag so Not assigned cannot be set when the bug is in this status
- Set the bug status to "Unpublished", so it is not visible in "All bugs in this project" (but visible to the reporter in "Bugs reported by me")



Transitions (going from one bug status to another)

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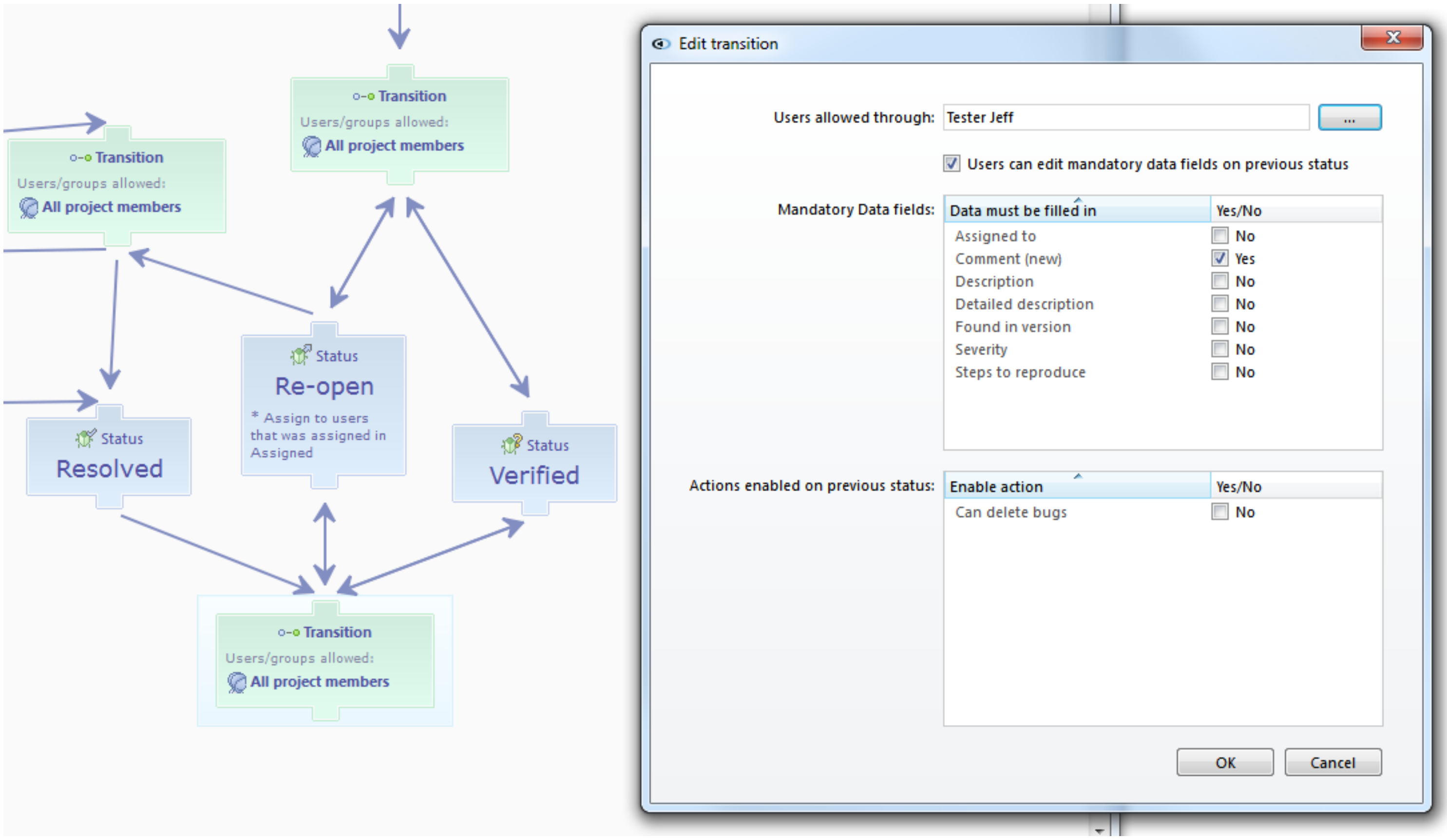
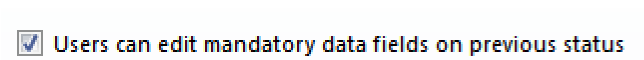
Limiting the users that can go from one bug status to another and other such limitations are handled through bug workflow transitions.

Example

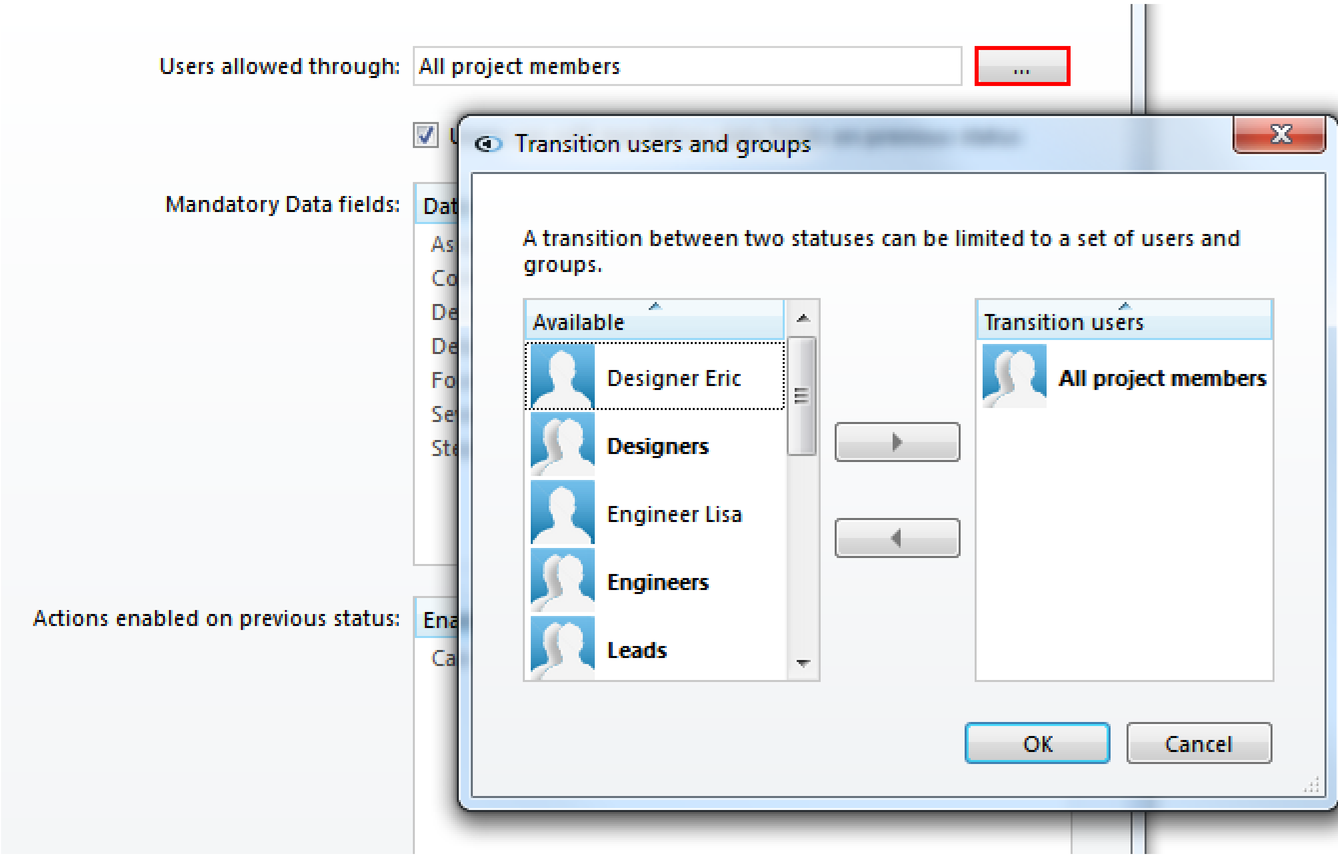
One workflow can look like this where the bug is assigned and when it is resolved, the developer sets the bug status to "Resolved". When the bug is "Resolved", it is auto-assigned to the members of user group "QA Testers". Proceeding from "Resolved" to "Verified" can only be done by the members of "QA Testers" in this case. Also, the "Comments" field must be filled in before progressing to "Verified".



One advanced and important setting on a transition is to be able to edit certain fields within a bug, when it is in a specific state. For example, QA testers cannot normally edit the "Bug status" field, but when the bug is in the state "Resolved", they are the ones that can edit this field.



To change which users and user groups can make a transition from one bug status to another, click the Users allowed through button:



Limiting who can report bugs

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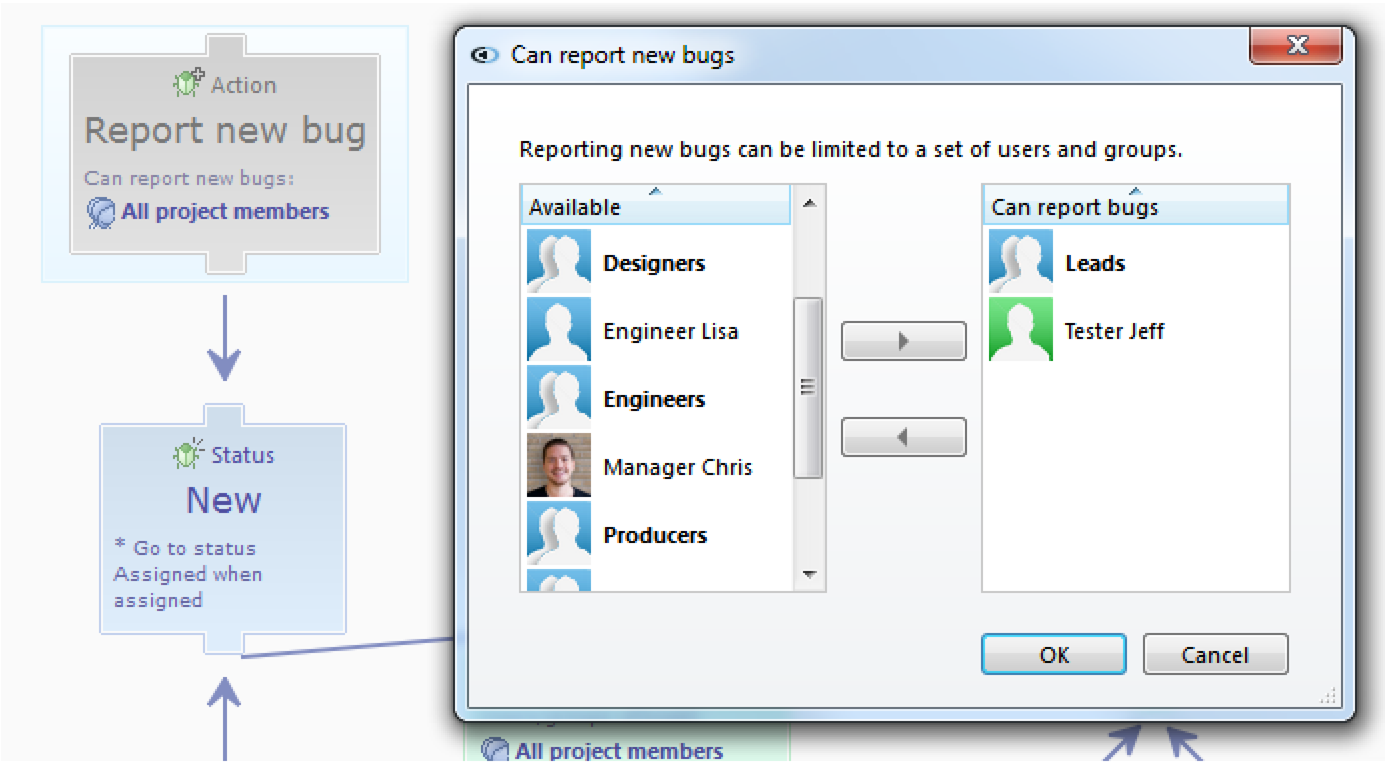
You can limit who can report bugs by double clicking, or by going to"Edit", the grey "Report new bug" box in the bug workflow. You can then decide who can report new bugs by selecting individual users or user groups:



Forcing bug reporters to enter bug data on a bug status

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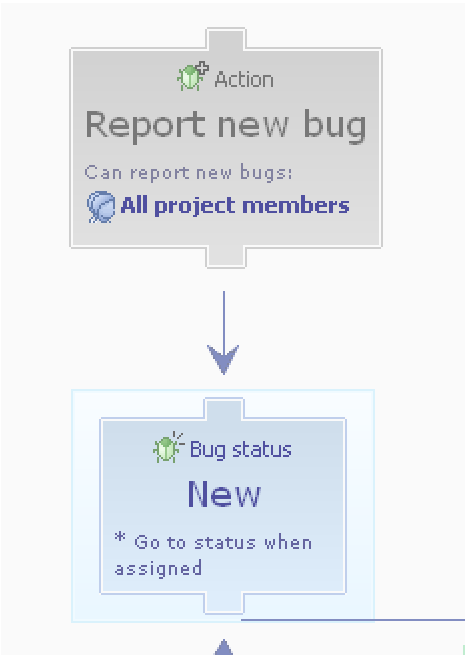
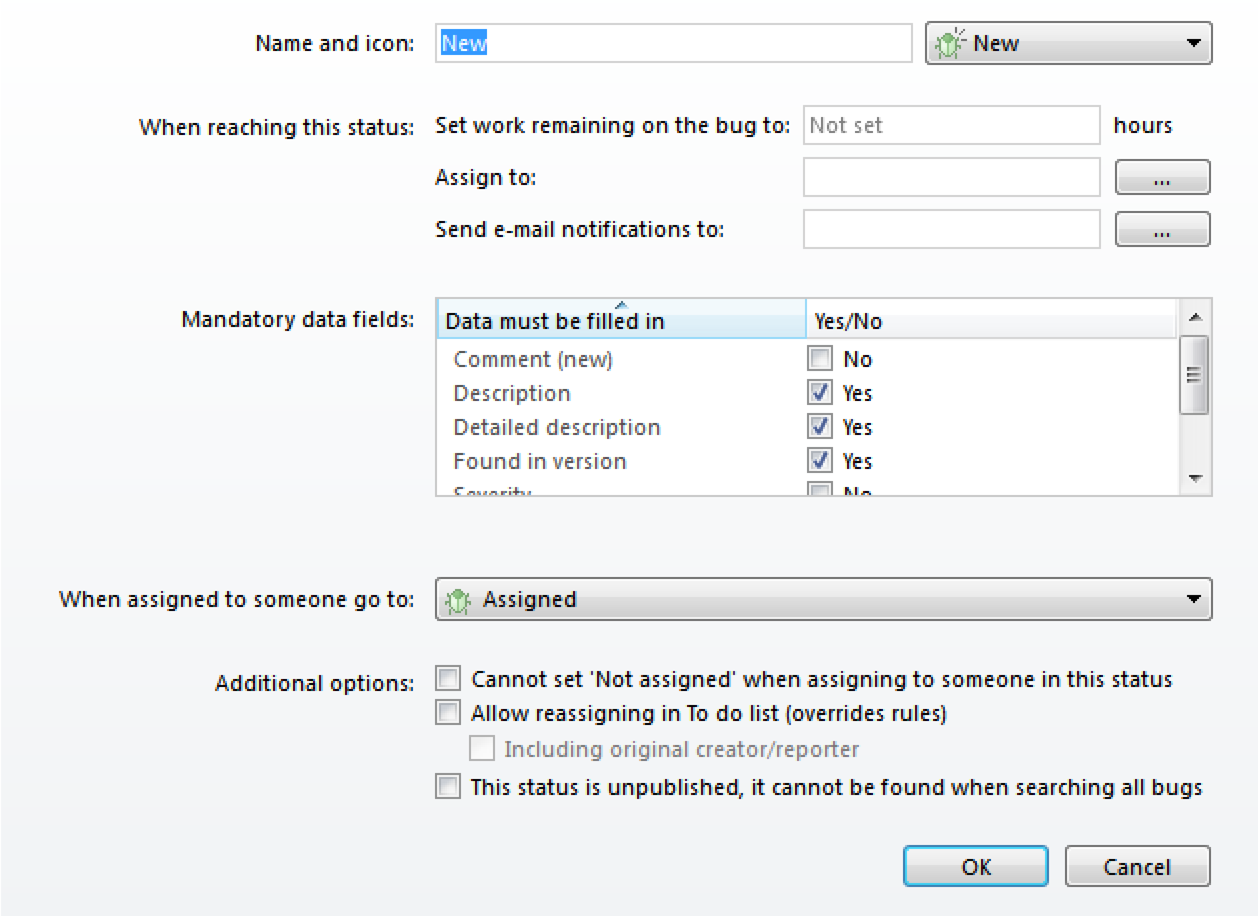
Forcing bug reporters to enter certain bug data on a newly reported bug before setting a user or proceeding in the workflow is often a fundamental part of the workflow in QA.

You can force data to be entered when going from one bug status to another by using a transition.

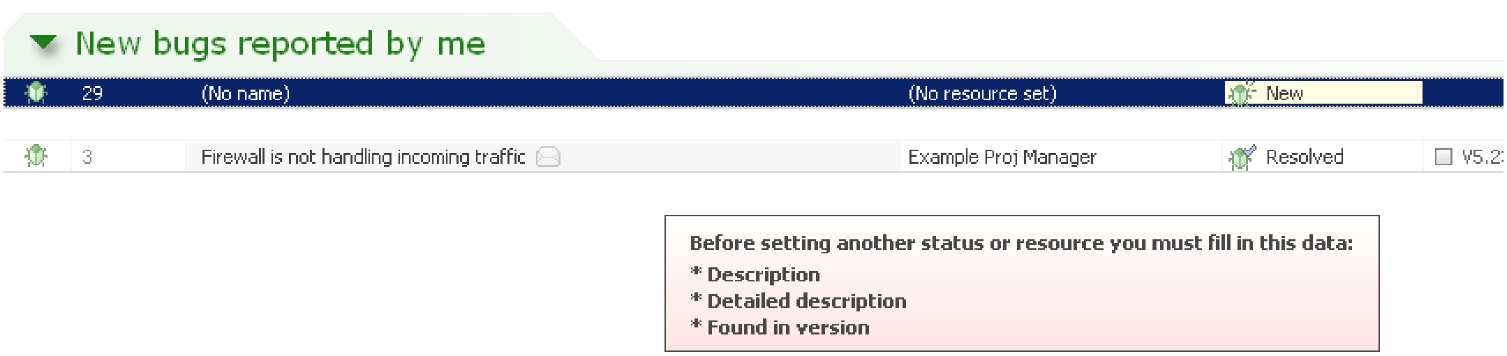
It is recommended that you set the "force bug data to be entered" on the first bug status in the workflow, in this case status "New":

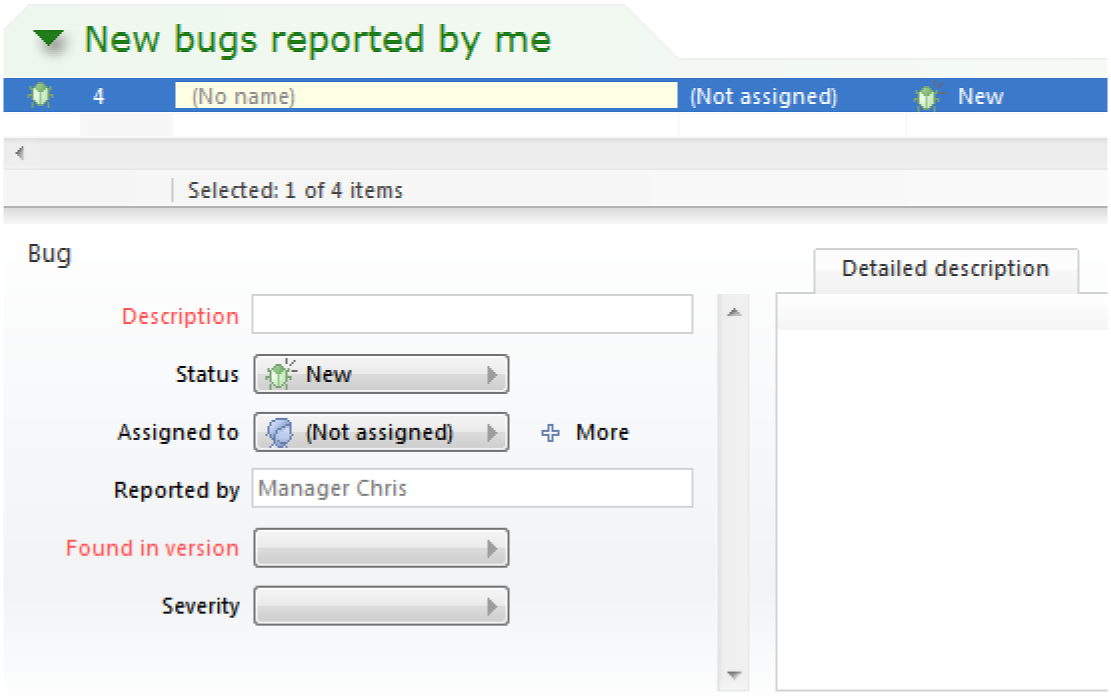


Edit the bug status and select bug data that must be filled in before setting a user or another bug status. In this case, we have set "Description", "Detailed description" and "Found in version":



When users try to set another user or bug status they will get this message (as an example):





Adding extra columns

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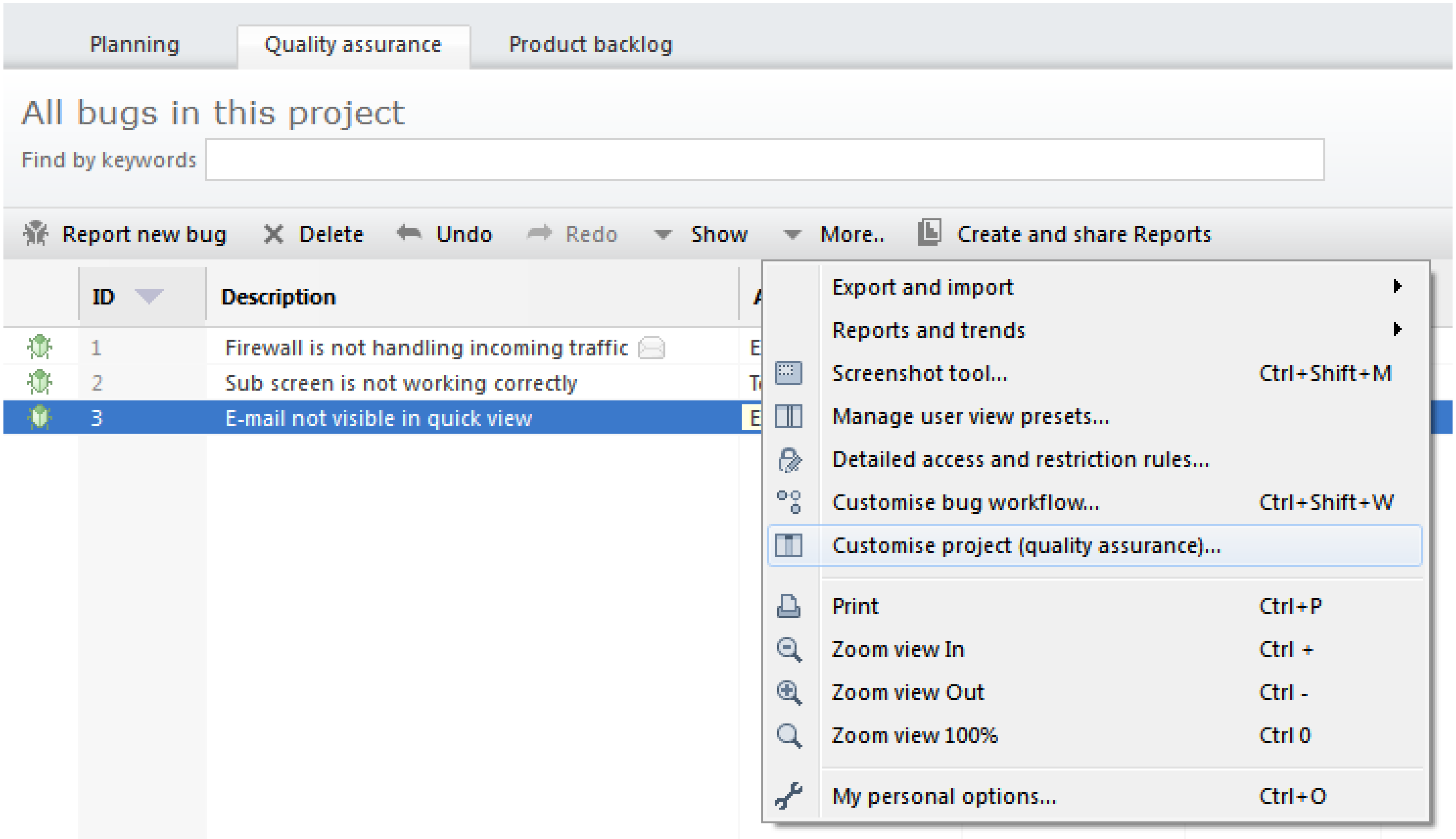
Adding extra columns is a fundamental part of customising QA to fit your needs. You have to be a "Main project manager" to do this.

Go to the More menu and then Customise project (quality assurance)



Accessing the Customize project dialog for QA

Here you will be presented both with pre-defined columns such as "Last commented on" as well as the possibility to create your own custom column such as "Found in version".

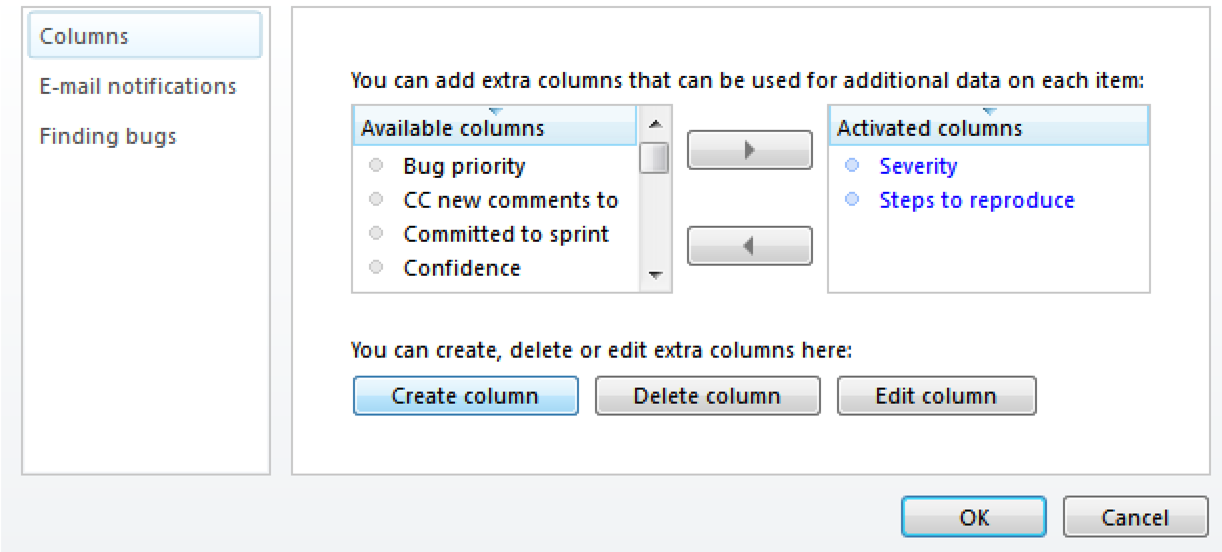
The pre-defined columns are:

- Last commented on (time when the last comment was made)
- Last updated on (time when the bug was last updated)
- Linked to task/item/bug (linked to another task or bug in any project)
- Originally reported by (who was the original reporter)
- Severity (severity for this bug)
- Complexity points (an agile metric that describes the complexity of performing the task)
- Confidence (how confident a user about solving the bug)
- Hyperlink (link to something outside Hansoft)

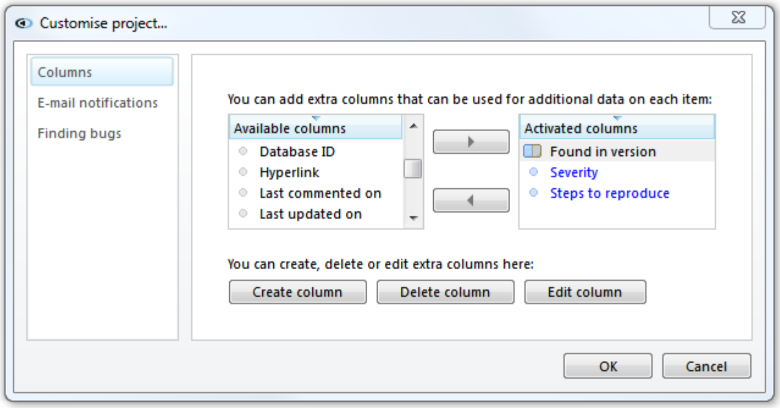
•Priority (Priority of the bug)

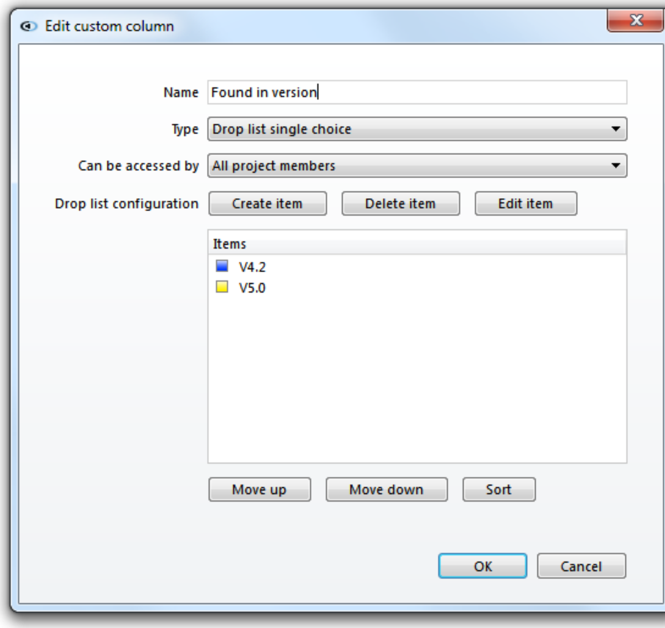
•Release tag (Linked to a scheduled release/milestone)

•Risk



To create your own column, click on "Create column". For example, a very common column to create is "Found in version". Select type "Drop list" and create an item for each version:





Now, "Found in version" will be visible in the project columns and you can find on it and see how many bugs that has "Found in version" over time in trends etc.:

	ID	Description	Assigned to	Status	Found in version
	1	Firewall is not handling incoming traffic	Engineer Lisa	Assigned	V4.2
	2	Sub screen is not working correctly	Tester Jeff	Re-open	V4.2
	3	E-mail not visible in quick view	Engineer Lisa	Assigned	V5.0

Detailed access and restriction rules

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Hansoft offers extensive functionality in giving and restricting access to bug column data and other parts (like deleting bugs, importing XML, documents or customising the workflow and more).

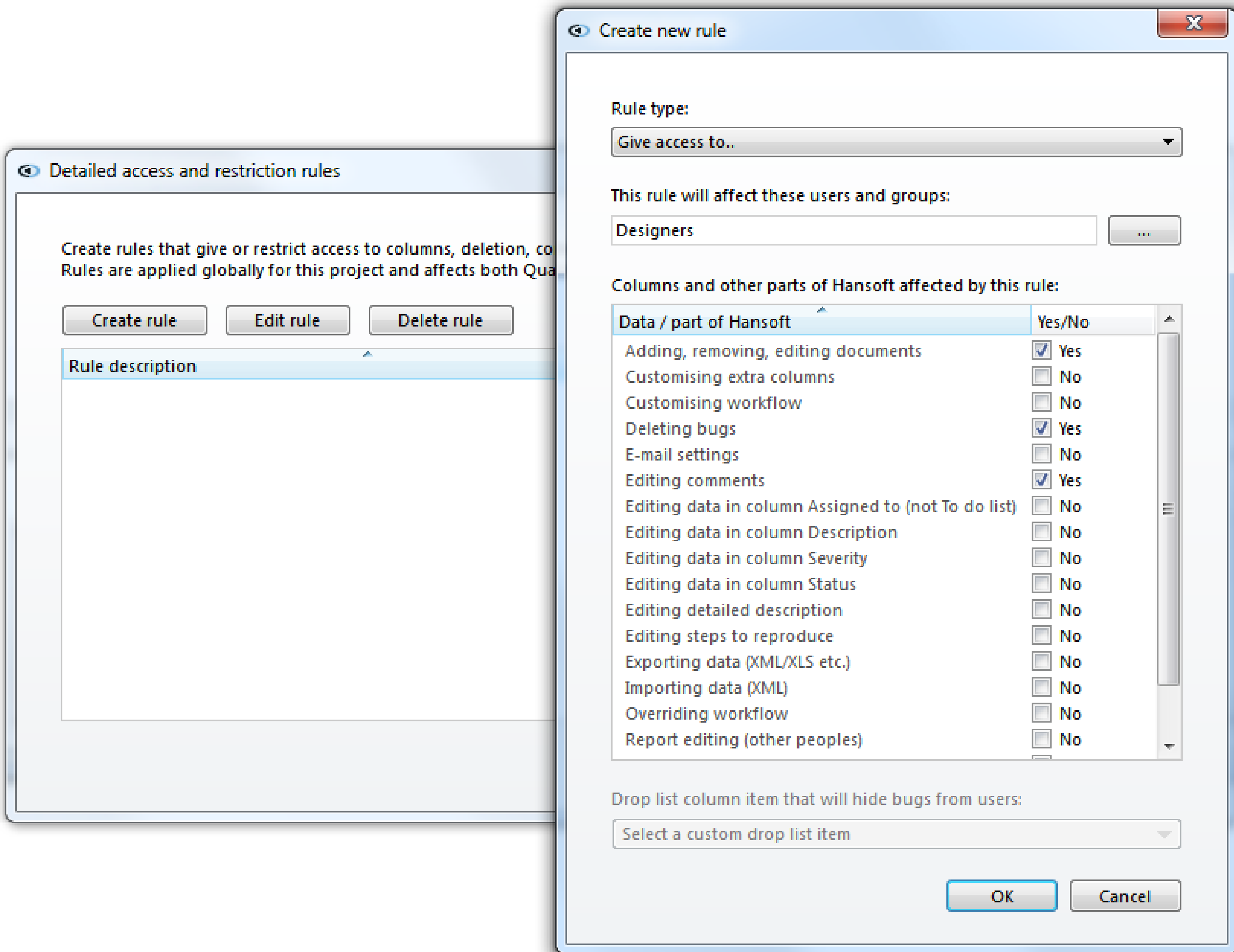
Bugs can be hidden for a specific user or user group when a bug has a certain custom column item selected (for example custom column Hidden set to drop list item Hidden Yes, hides the bugs from user group "Outsourcing partner").

The rules are global and affects all members (even Main project managers) and all views (Bugs reported by me, All bugs and the To do list).

The only thing that can override a rule is a transition that lets you edit certain fields on the previous bug status and

reassigning in the To do list (set on a bug status).

Note: Only Main project managers can change detailed access and restriction rules.



Creating an access and restriction rule

Auto generated E-mails in QA

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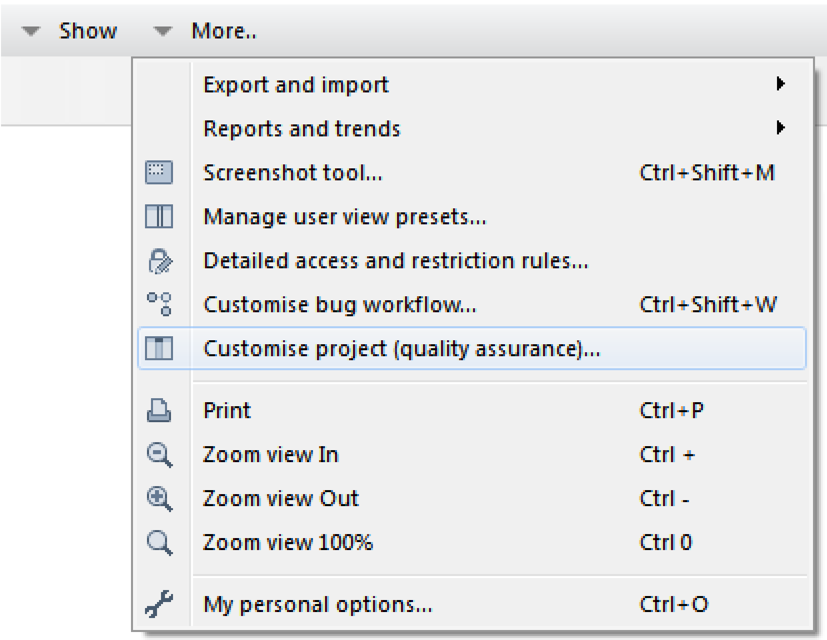
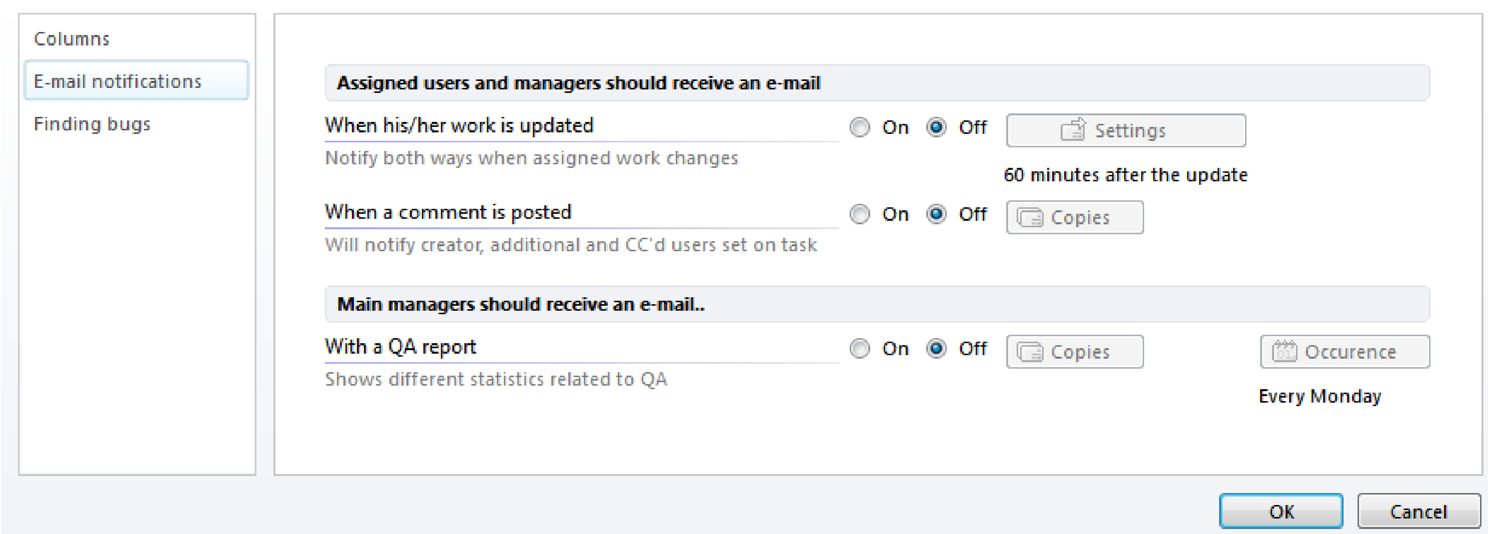
You can have specific E-mail settings for QA (along with E-mail settings for the project). E-mails are delivered in the HTML format and all references to bugs (or tasks) have hyperlinks that link directly into the Hansoft application.

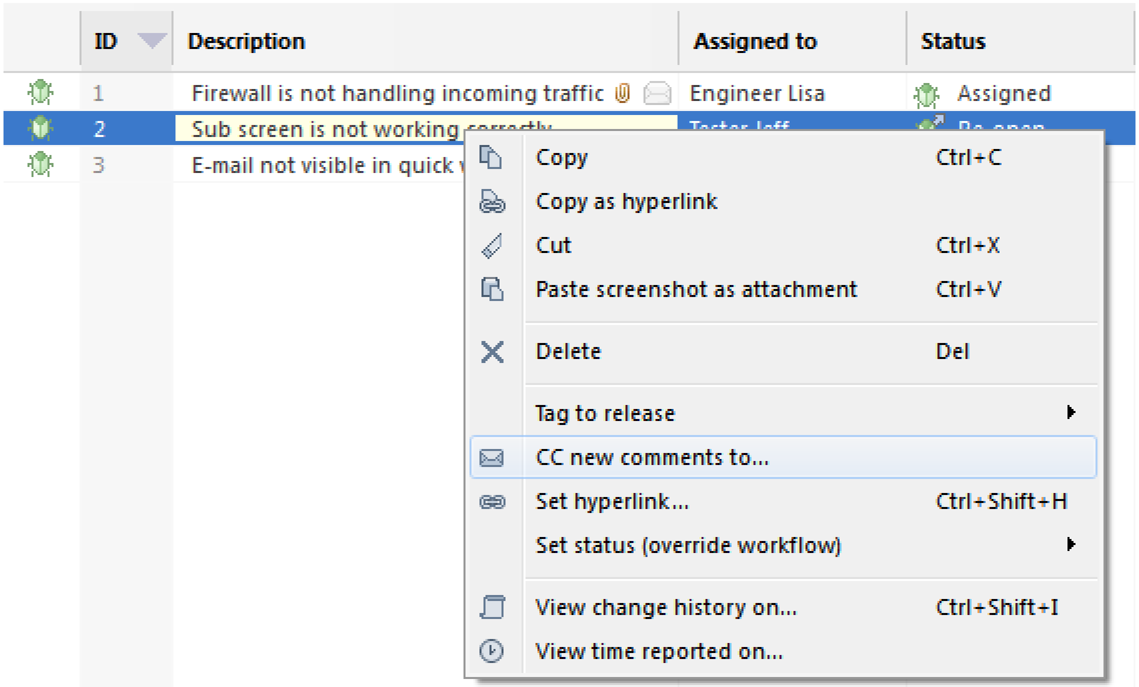
QA E-mail settings are found in the Customise Project (QA) dialog, opened from the More menu.



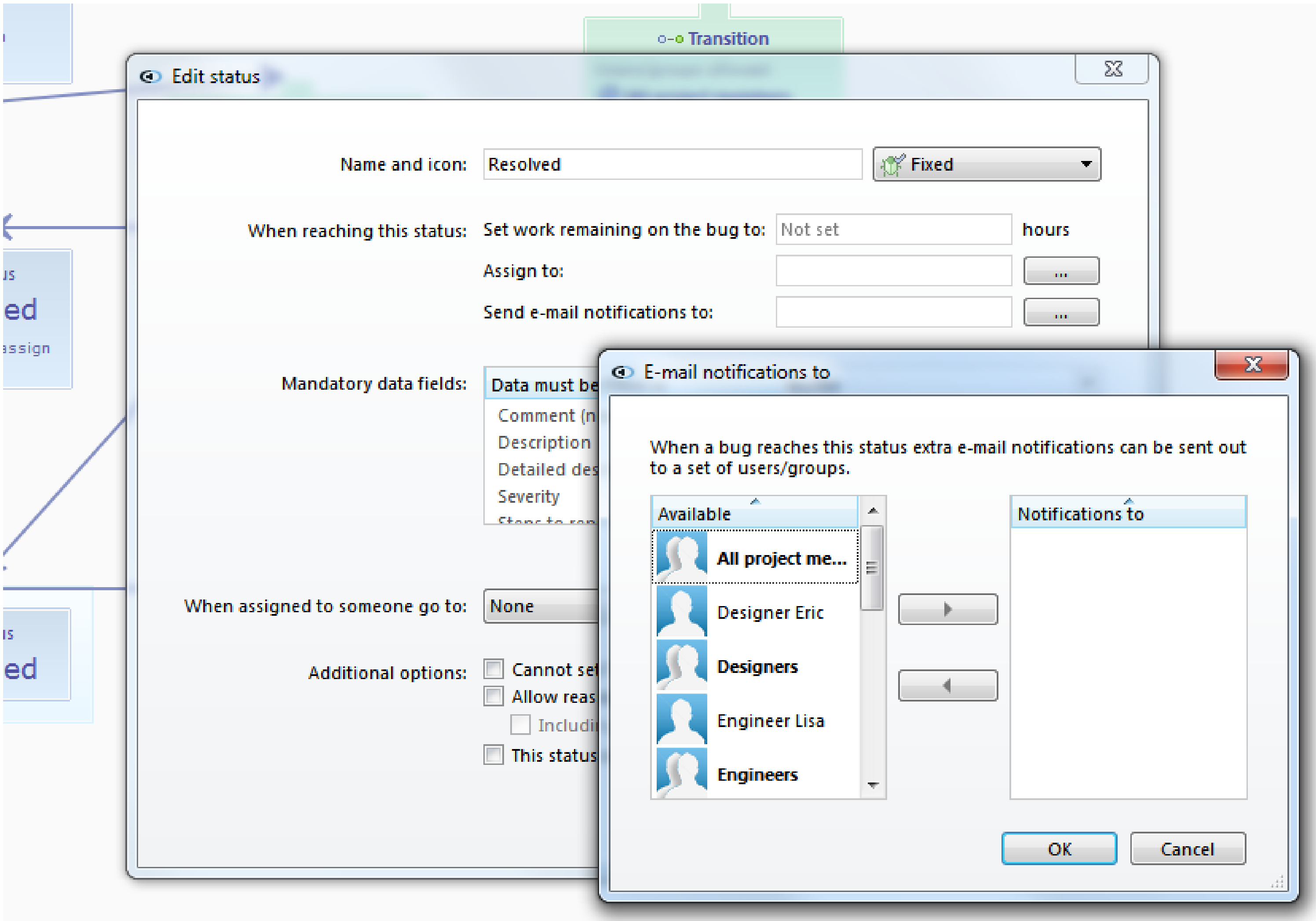
Here you can switch different parts of auto-generated E-mails both on and off:



In addition to this, you can CC new comment posts to individuals or user groups:



As shown in an previous chapter, you can also notify individuals or user groups when a bug reaches a specific status (here the user group "Project managers" is notified when a bug reaches status "Closed"):



Detailed description and Steps to reproduce

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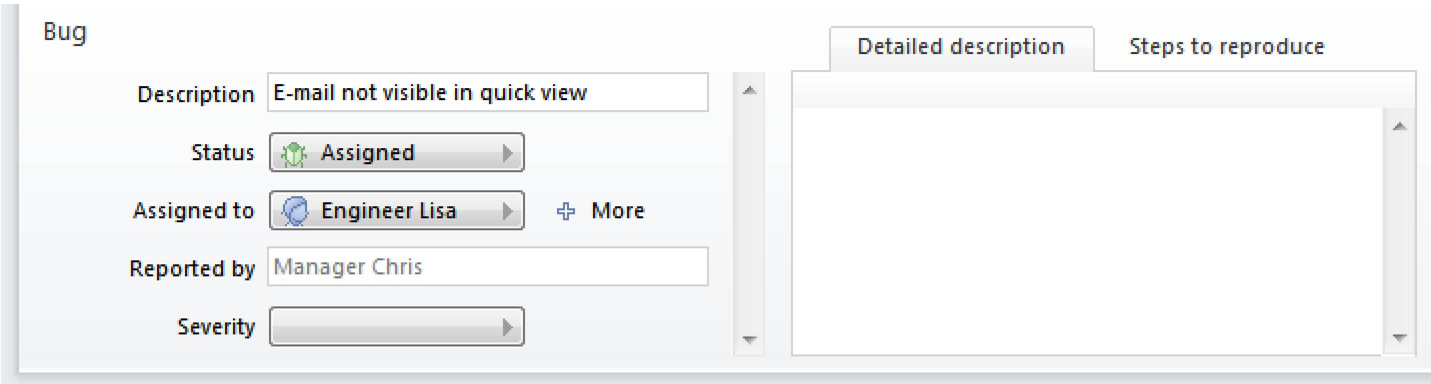
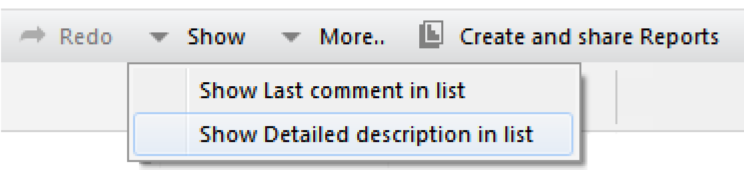
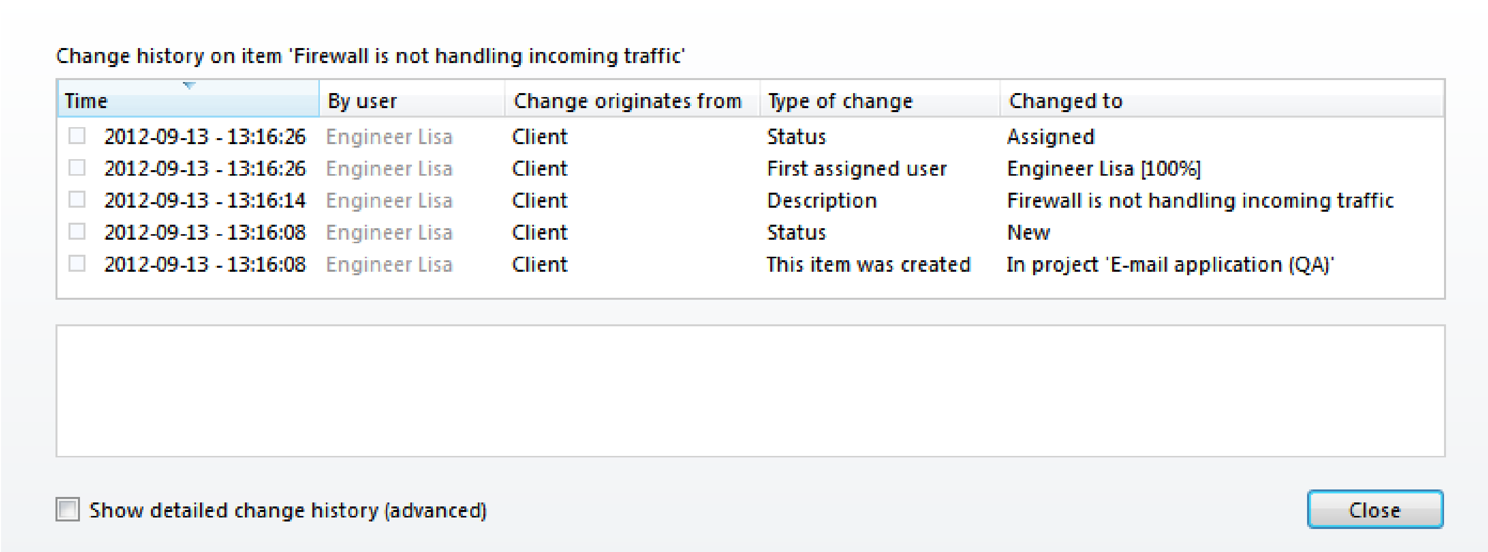
For each bug you have a Detailed description and Steps to reproduce:



You can view in the bug list (and print) and find on detailed description by going to "Show" on the toolbar and then "Show Detailed description in list":



A history of detailed descriptions and steps to reproduce can be found in [Detailed bug history](#) (from the right click menu on a bug). Here you can see the full history of these two:



Screenshot tool

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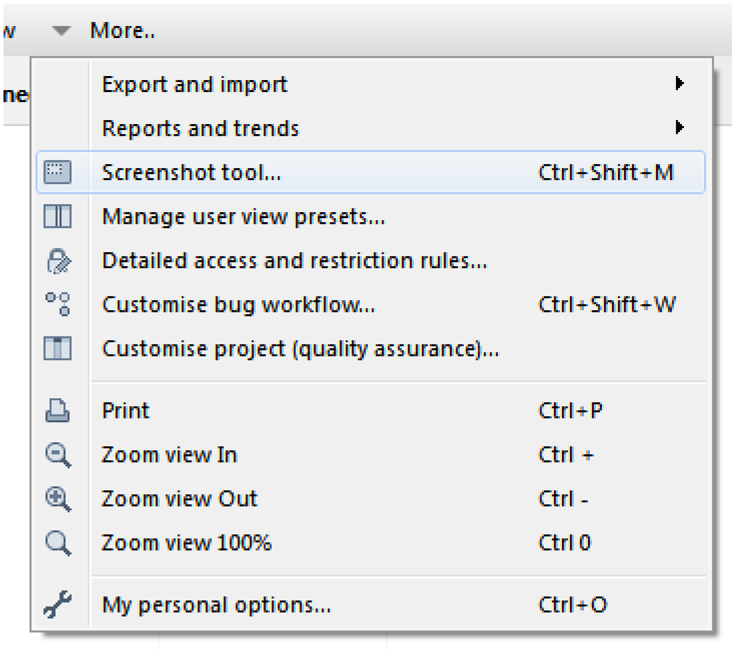
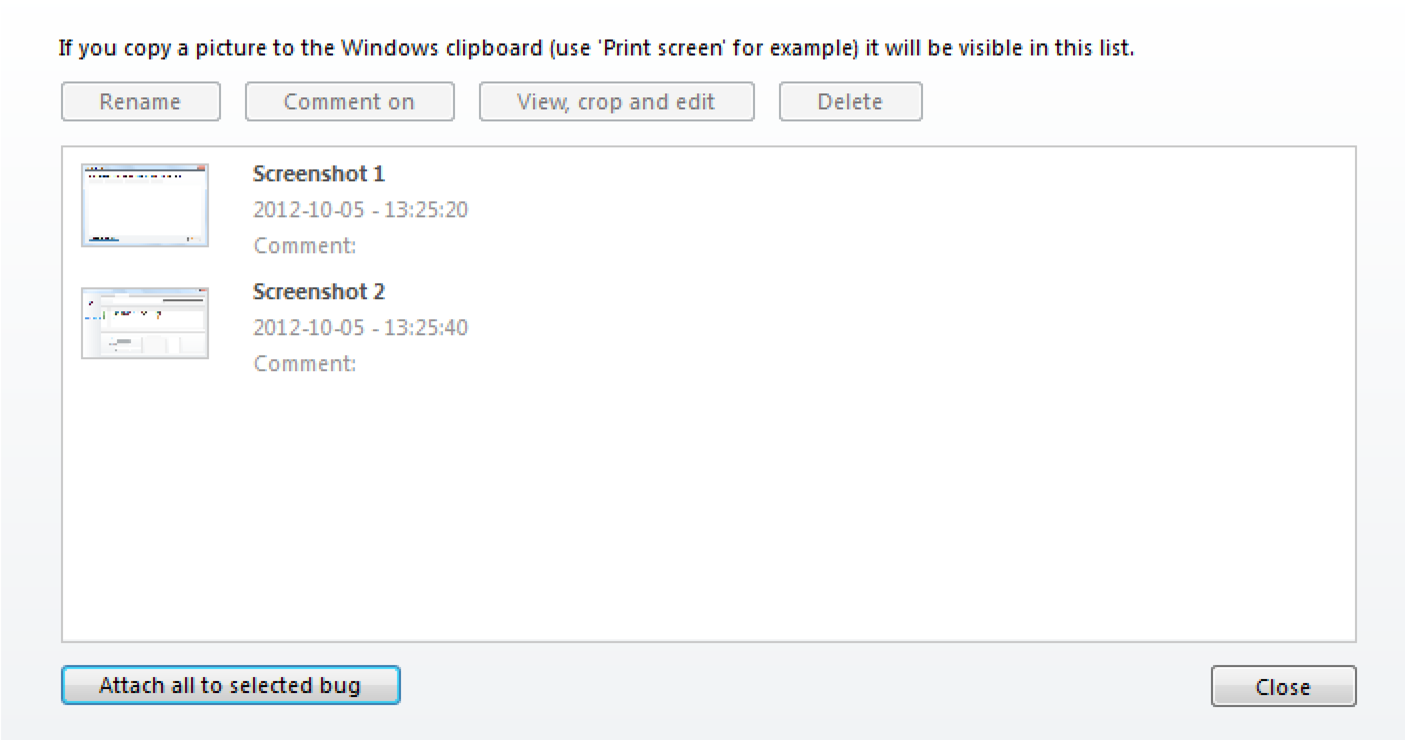
The screenshot tool in Hansoft is there to make it easy to capture screenshots and attach them to a bug.

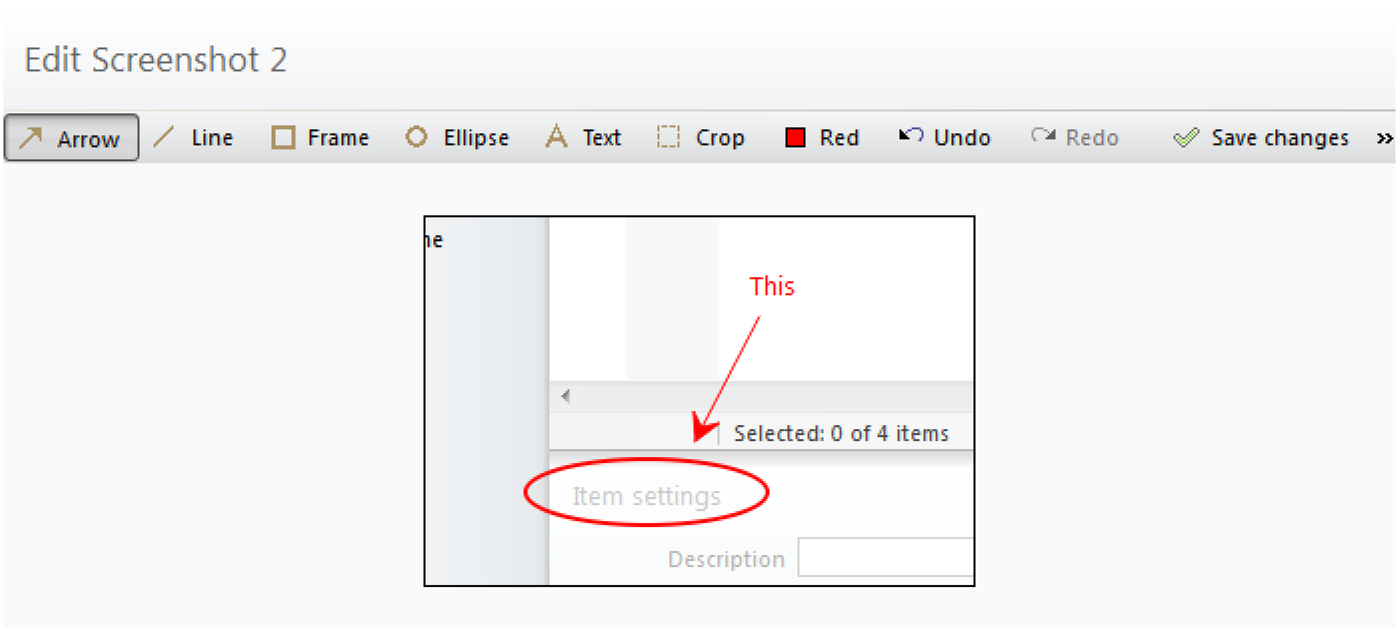
Go to the More menu and select Screenshot tool (or press Ctrl + Shift + M (Cmd + Shift + M)):



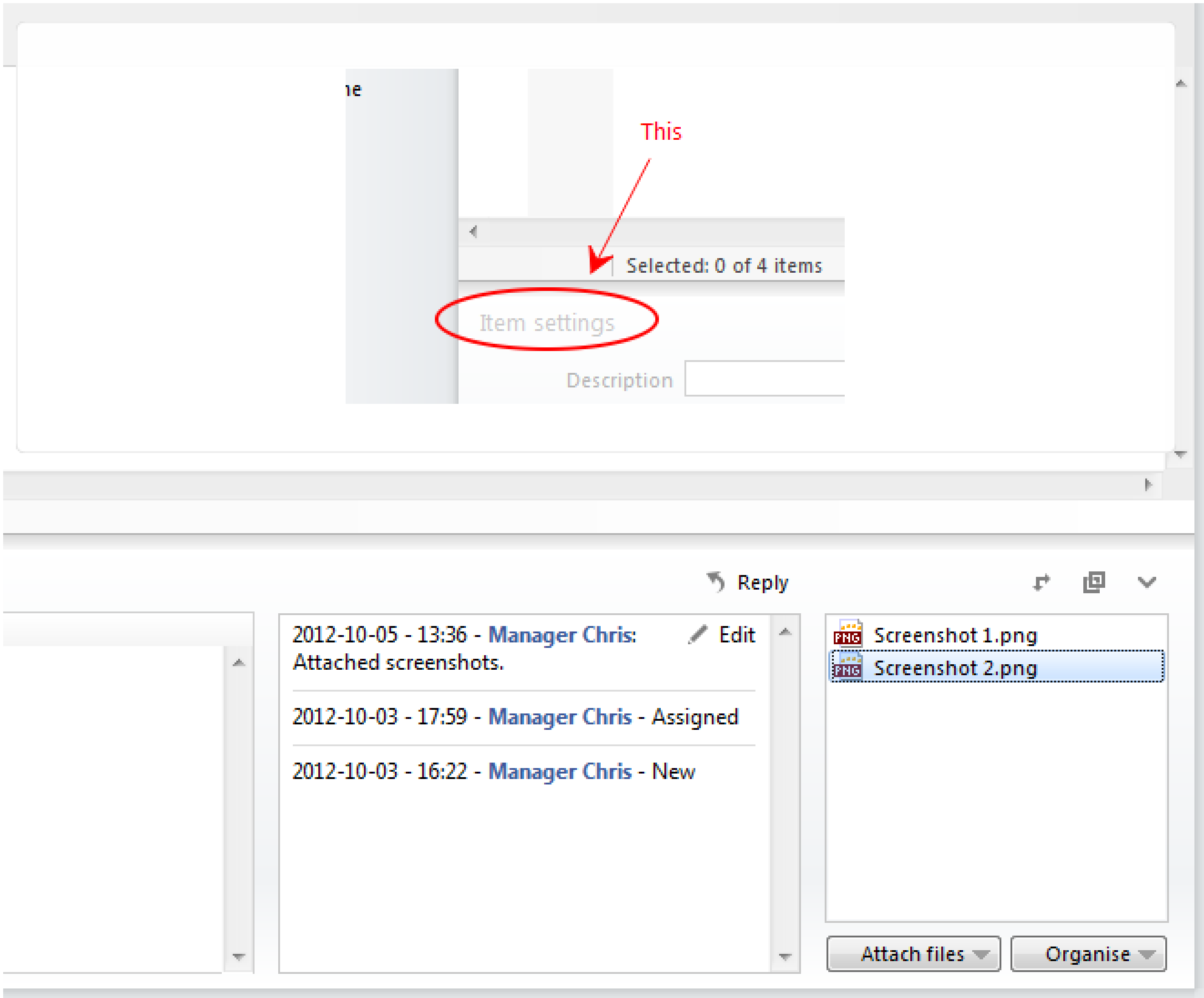
Capture a screenshot by pressing Print screen on your keyboard or by copying a picture into the clipboard:



You can edit the screenshot (lines, ellipses, text and cropping) and then save the changes:



After capturing the screenshots (which will be saved as .png) and attaching them, they will look like this in the bug details window:



Attaching files to a bug (and auto preview)

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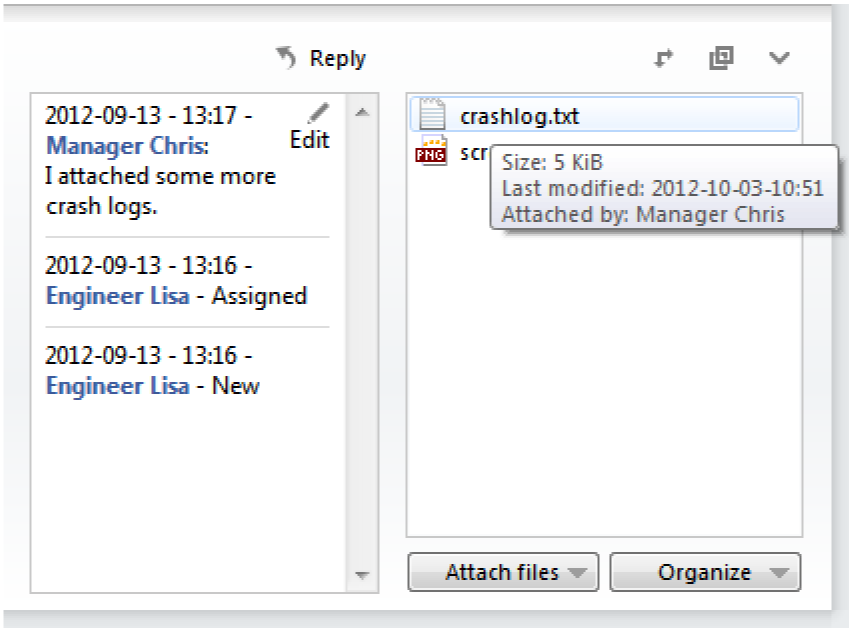
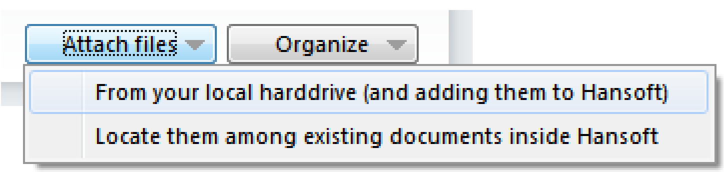
To describe a bug more accurately, you might need to attach related files. The rightmost section of the Item detail pane is the Attachments section. It displays a list of files attached to the current bug.



The attachments section

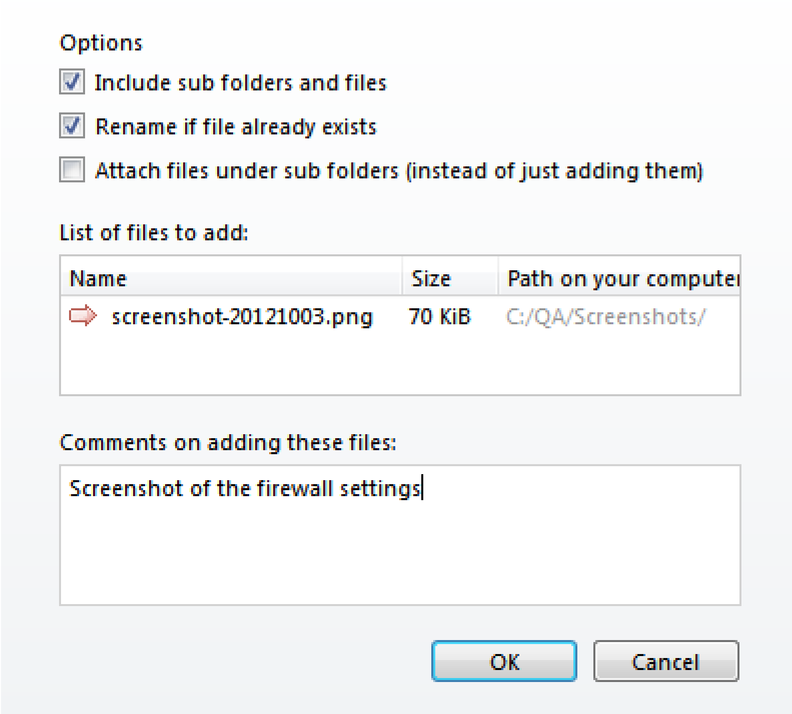
Attaching a file



The Attach files dropdown menu

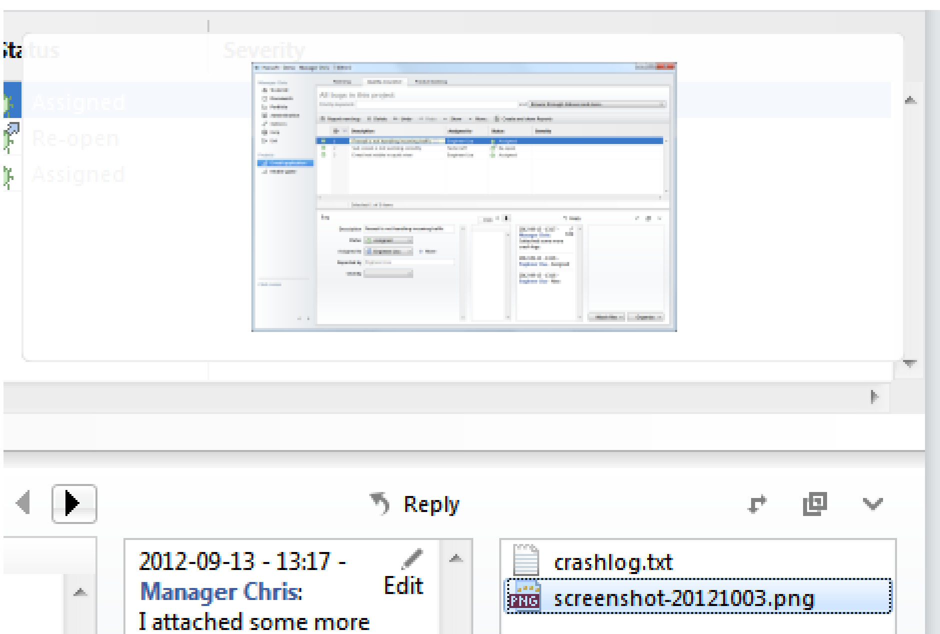
The easiest way to attach a file is to drag-and-drop it into the attachments section. Attachments can also be made by using the Attach files dropdown menu, which contains an option for attaching documents from within Hansoft.

When attaching a file, a dialog will appear, prompting for additional information about the file attached.



The Attach file dialog

Supported image file formats can be automatically previewed in the main view by clicking them. Double-clicking an attachment will open it in the application associated with the file format.



Auto preview can be turned off in My personal options.

Detailed bug history

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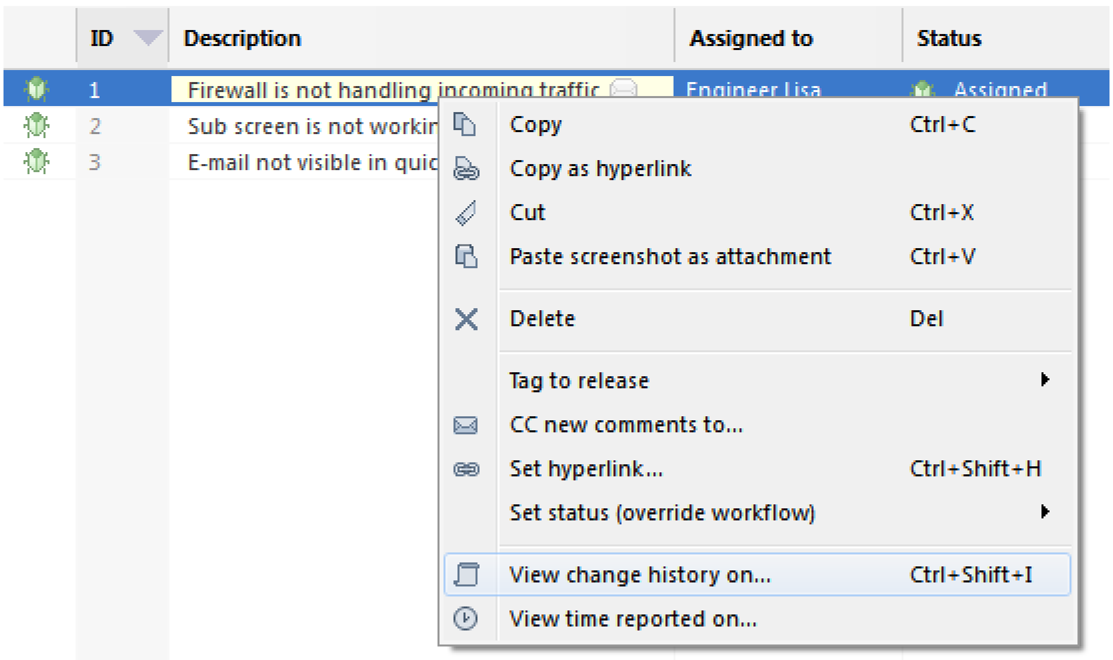
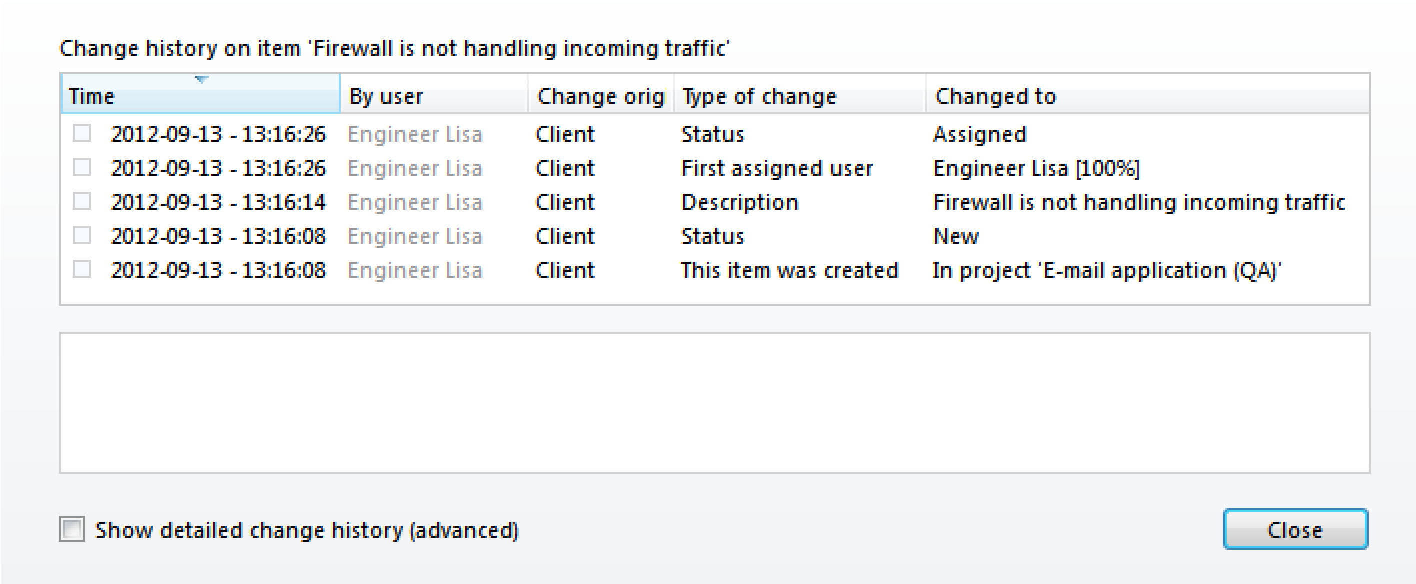
In order to analyse the actual workflow on a bug, you may want to see the detailed change history.

Everything that happens to a bug (or a task) is stored on the Hansoft server and then retrieved on demand.

Right click and select View change history on... or press Ctrl + Shift + I (Cmd + Shift + I):



A detailed bug history will be presented:



Working with multiple bugs at once

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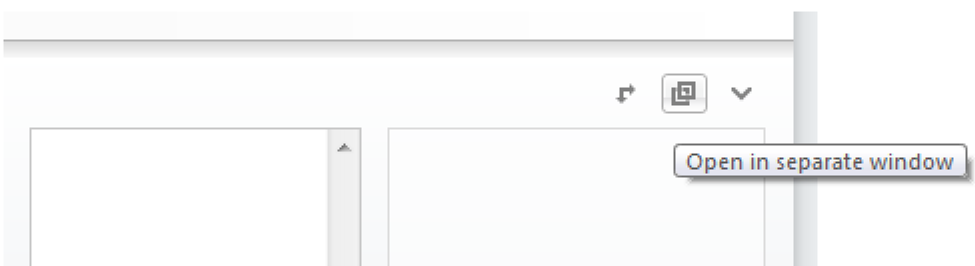
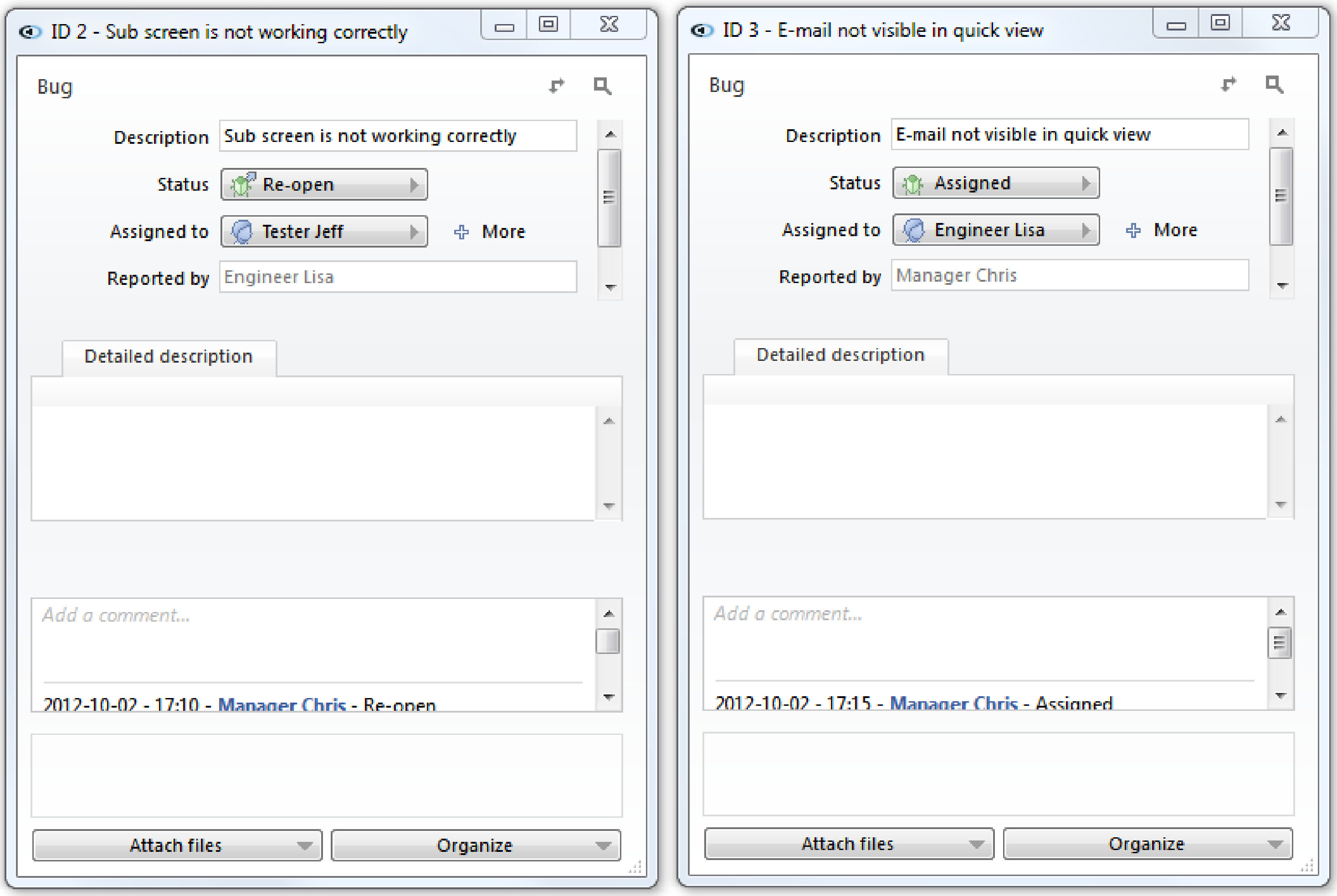
You can work with multiple bugs at once in Hansoft.

Click on the button in the details window:



You can now work with multiple bugs in separate windows:



Assign bug dependent on classification

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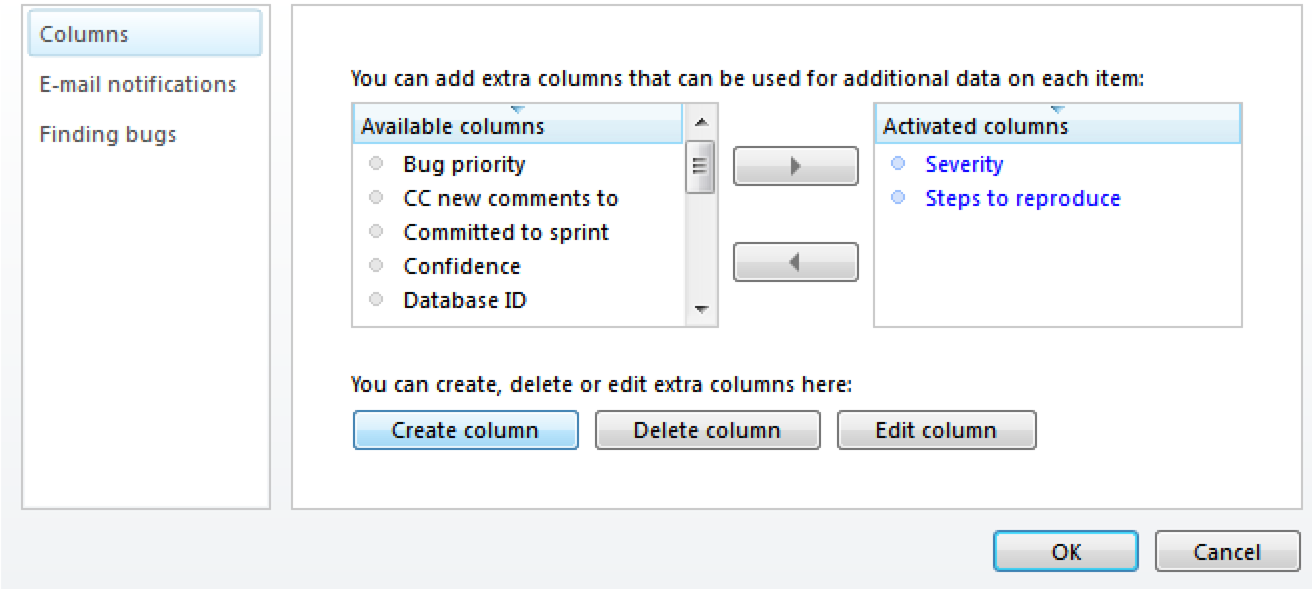
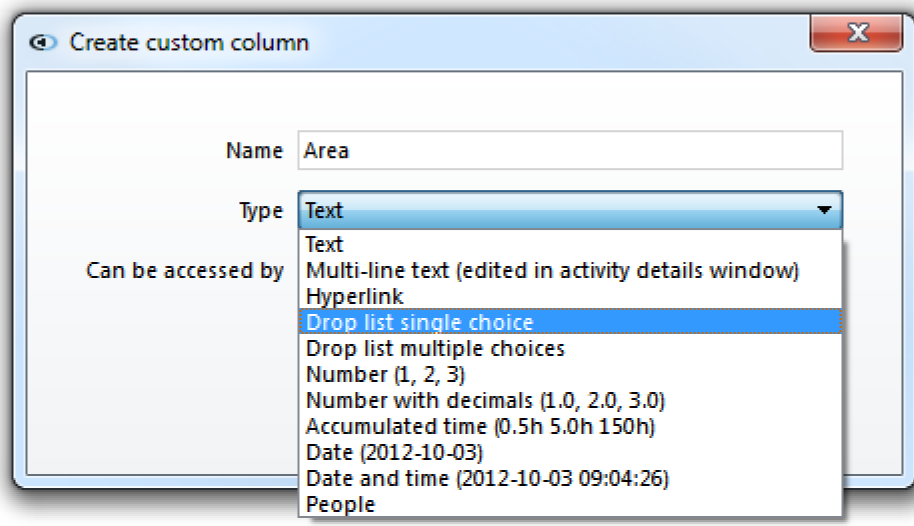
You can assign a bug to someone dependent on the selected drop list item. This can for example be used to assign a bug dependent on a classification like "art", "engine" or "textures".

Go to More, then Customise extra column, and create columns.

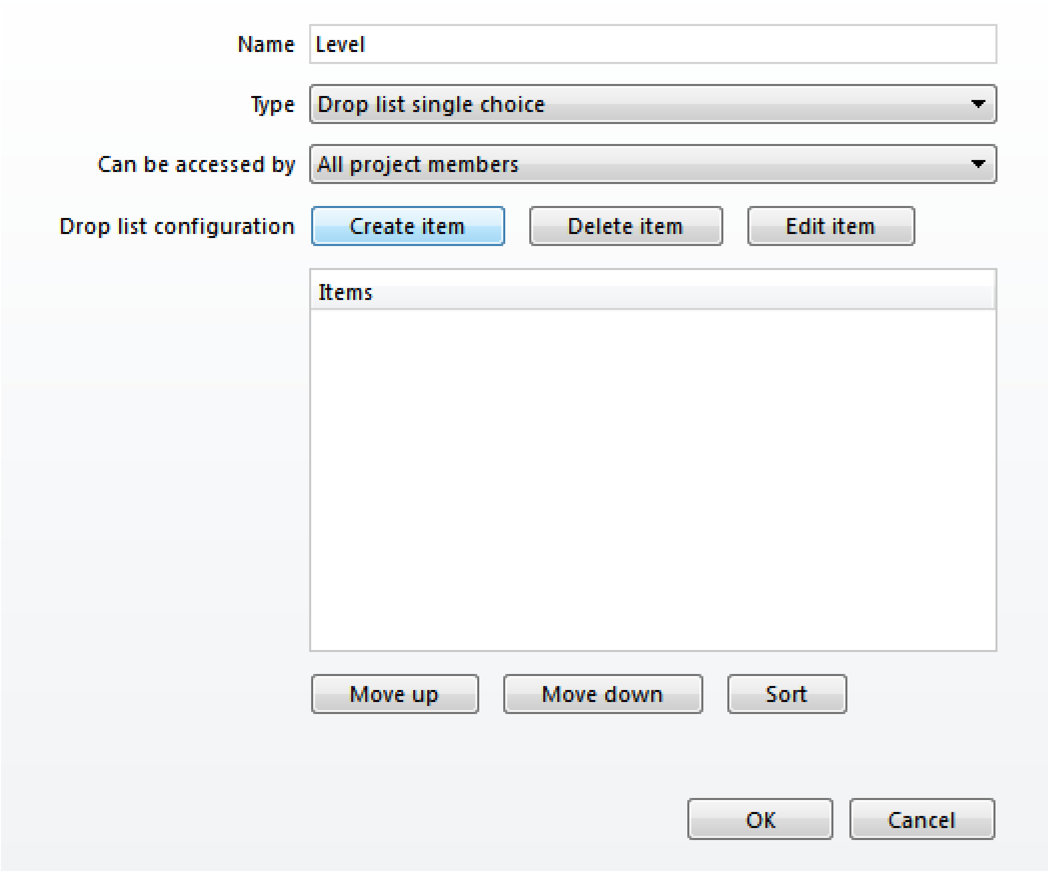


The Create column button in the Customise project (QA) dialog

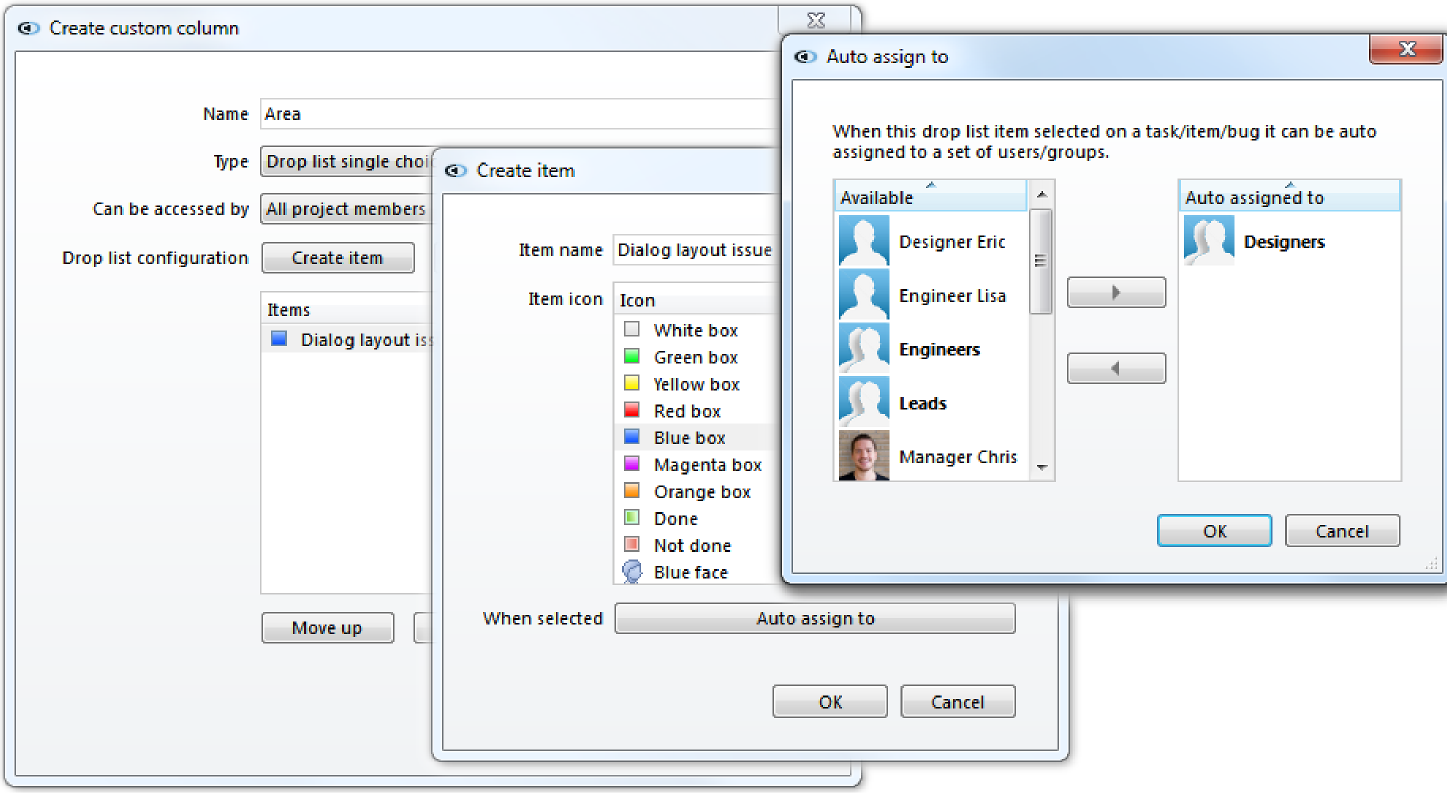
Create a drop list item and select Auto assign to users/groups":



Creating a droplist custom column



The Create item button in the Create column dialog



Setting an auto-assign user for a custom column drop list item

Selecting that drop list item will now assign the bug to the user or users in the group.

Commit bugs to a sprint/iteration

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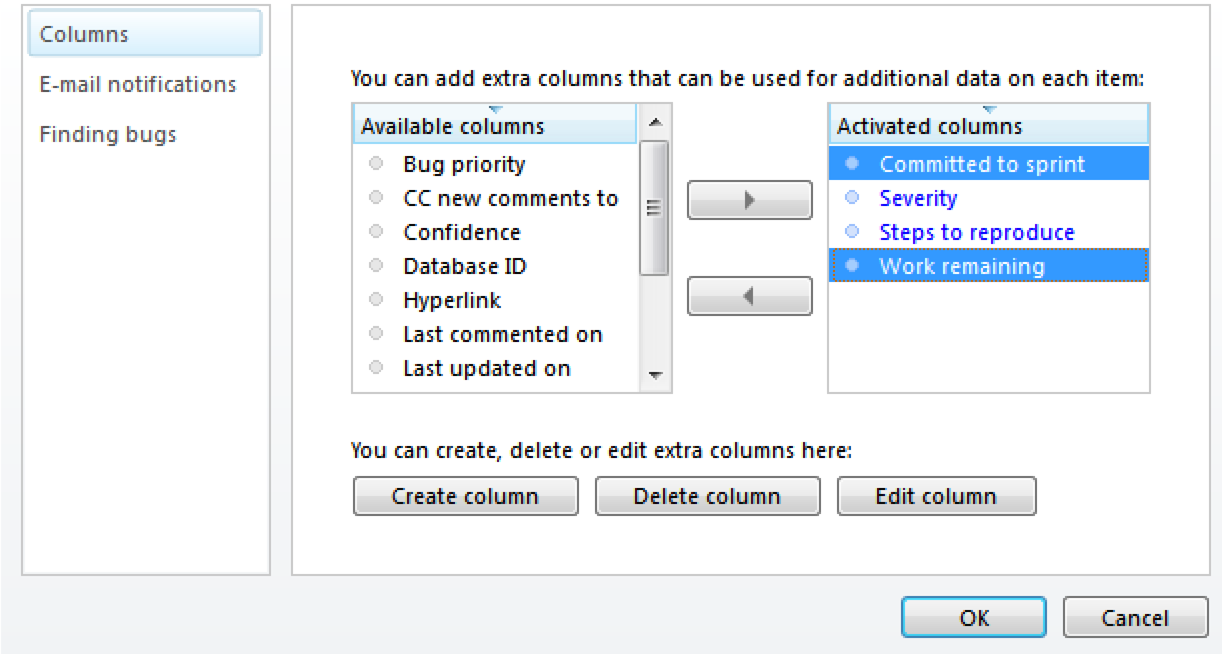
You can commit bugs to a sprint/iteration and report work remaining (hours) on them. This can be important because in a sprint/iteration bugs can stack up, taking extensive time to solve. This should be counted when measuring the total hours remaining on the sprint.

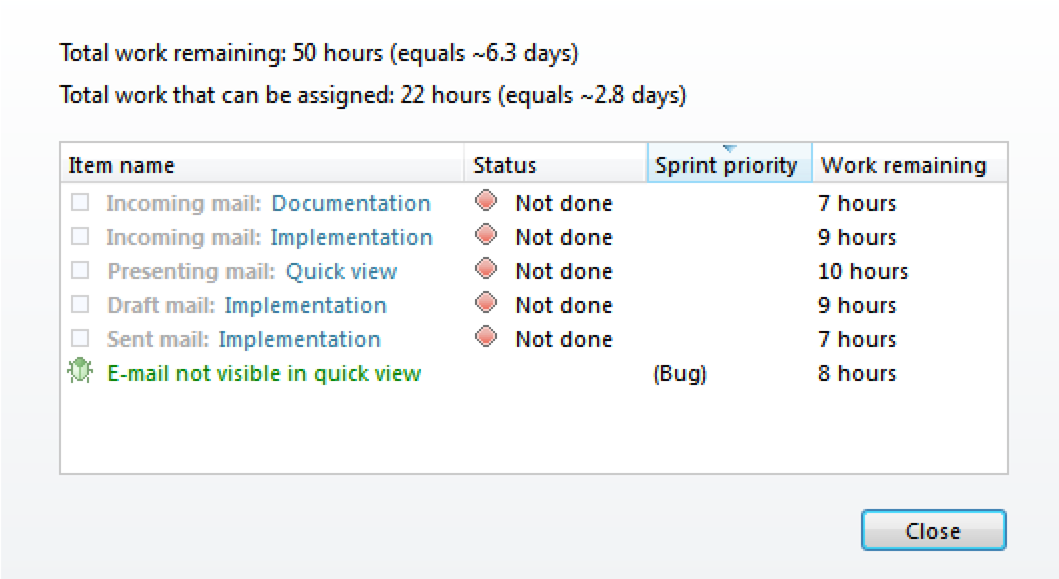
This functionality is enabled through the use of custom columns: Committed to sprint and Work remaining.



The custom columns section of the Customize project dialog for QA

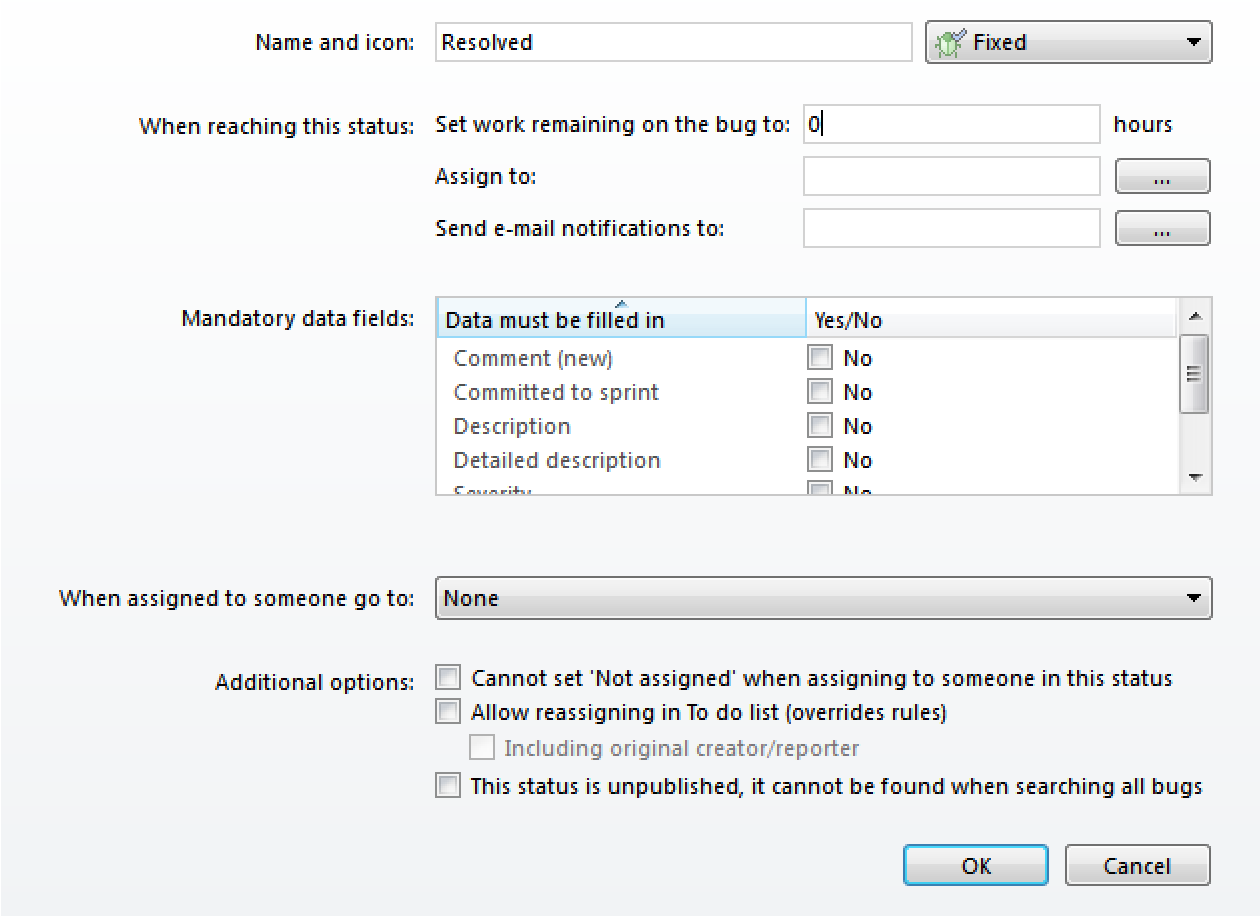
Bugs can now be assigned to sprints using the Committed to sprint column, where users can treat them much like tasks. By using the Work remaining column, the hours estimated will be included in user allocation calculations.

Bugs will also show up in the summarized list of tasks available in the People section of the sprint:



When a bug has reached a bug status, zero hours can be set automatically (mostly used when the bug is fixed/re-

solved):



Linking to tasks/items/bugs

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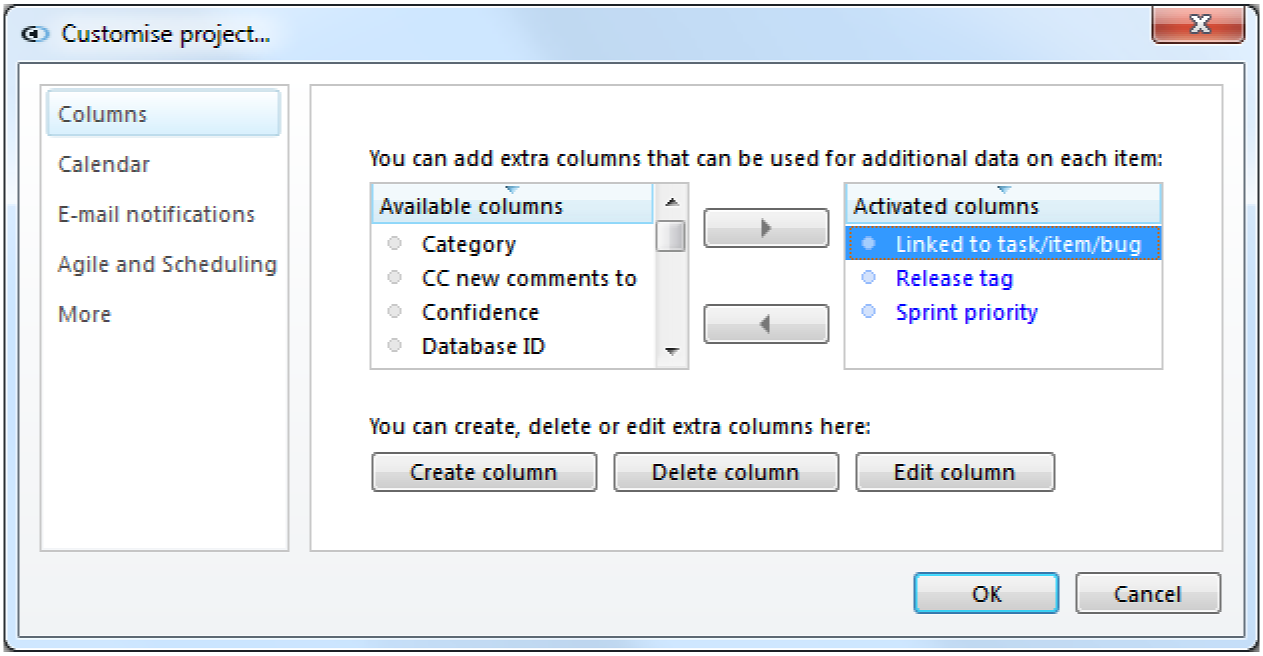
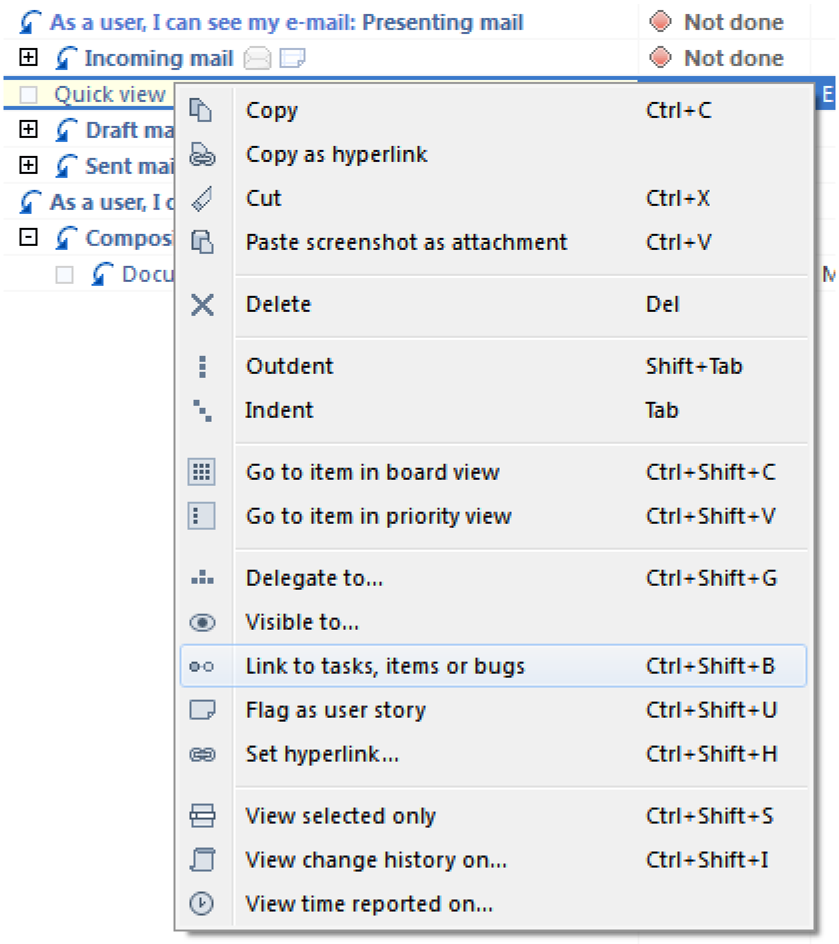
Hansoft offers functionality to link a task/item/bug to another task/item/bug. One of the most common cases is to link bugs to tasks and vice versa. This is, for example, useful when there are bugs related to a new feature in the product or similar cases.

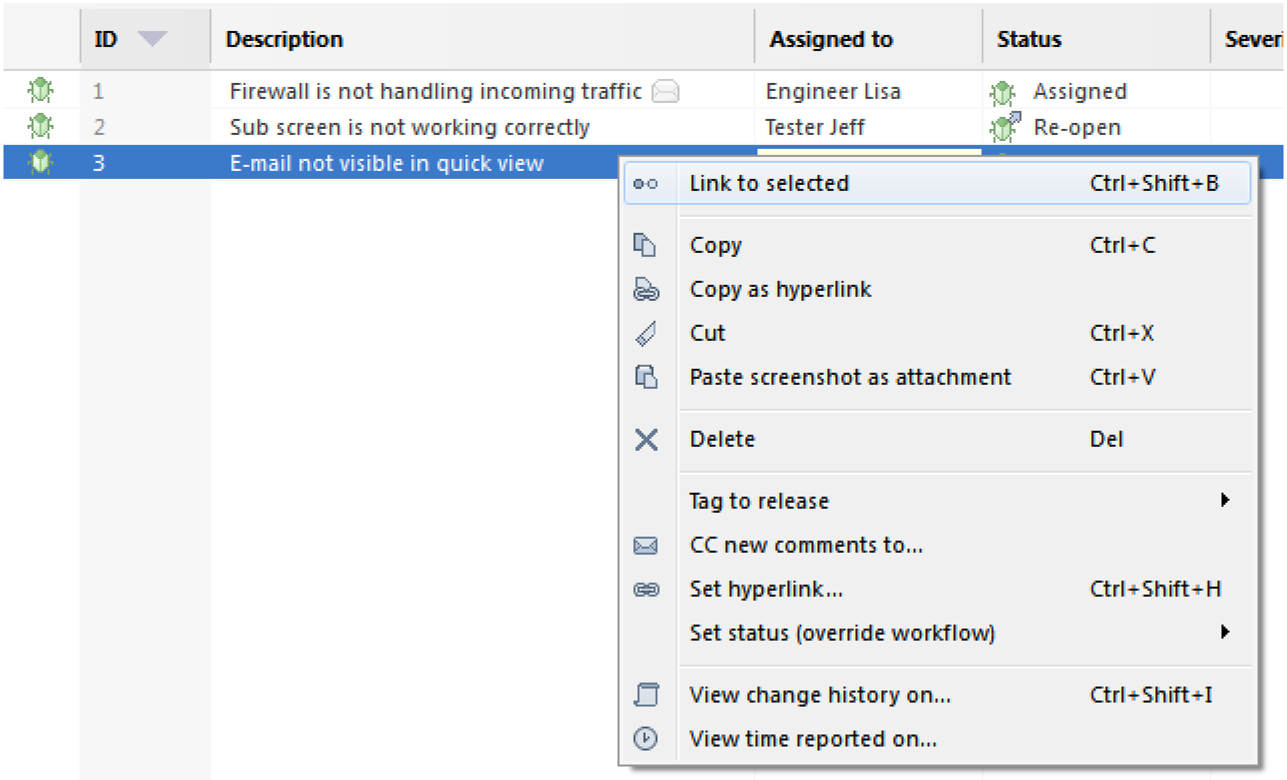
To activate this function, you must activate extra column "Linked to task/item/bug" in customise (both in QA and in the project view):



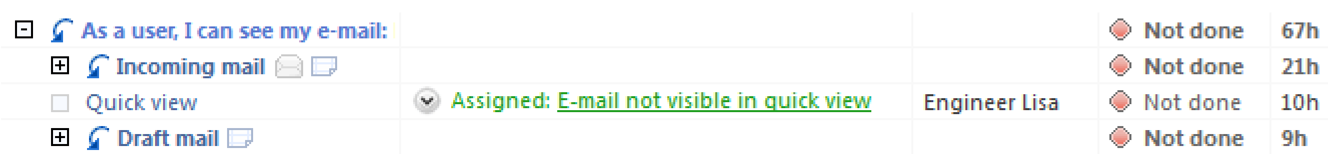
Go to the task or backlog item and select "Link to tasks, items or bugs":



Now go to the QA view, right click and select "Link to selected":



A link to the task/backlog item will now be visible in the column (it is cross-linked so a bug link is visible in the project view):



Trends in QA

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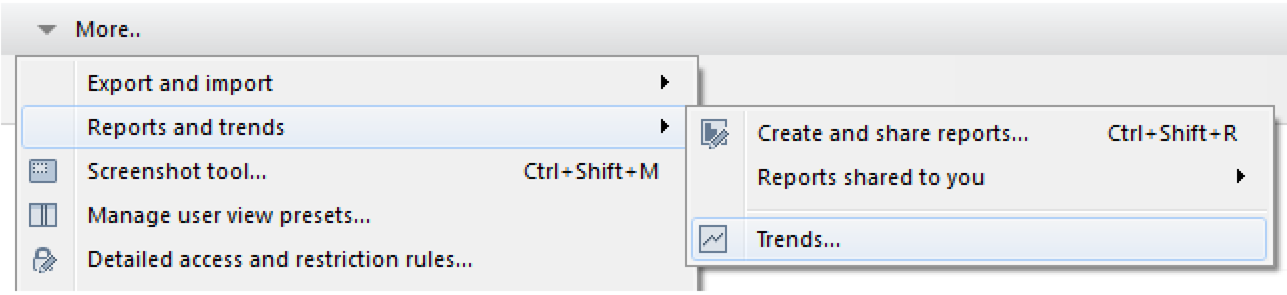
Analysing trends in QA is vital in order to analyse how the quality of a product is progressing and when it is going to be finished.

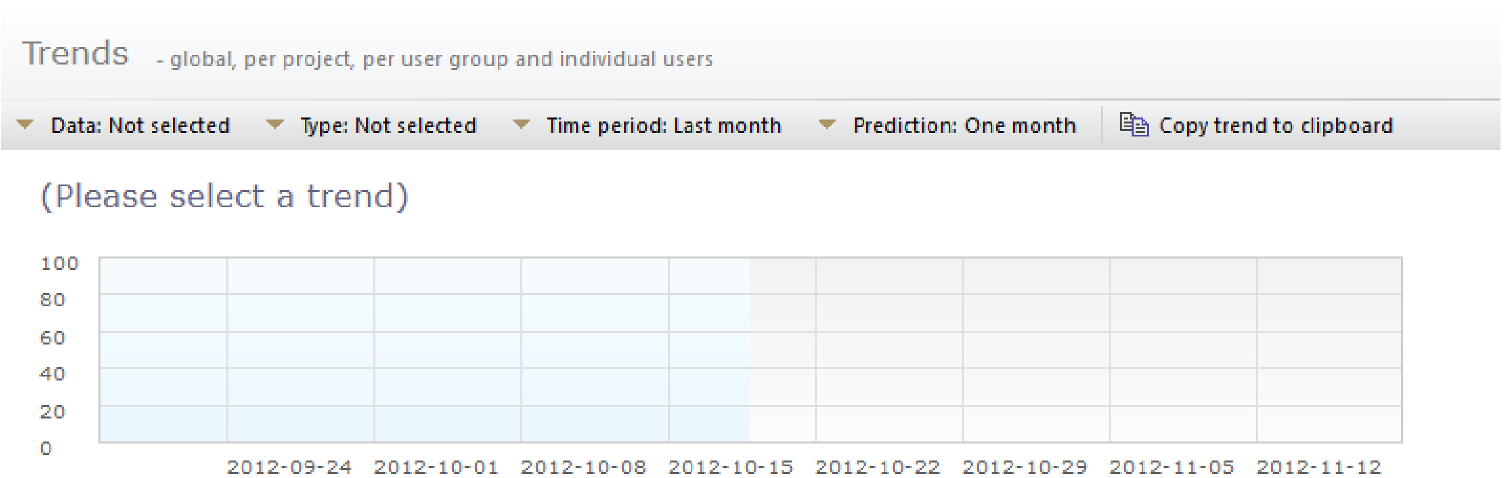
Trends in Hansoft are a combination of data (global, per project, per user group or individual) and type ("Severity", "Bug status" etc.). Trends per project can only be accessed by "Main project managers" and trends on a global level (across all projects) can only be accessed by Administrators (those who can create user accounts and projects). Trends can be copied to the clipboard in order to be used in printed or web reports.

Go to the "More.." menu and select "Trends...":



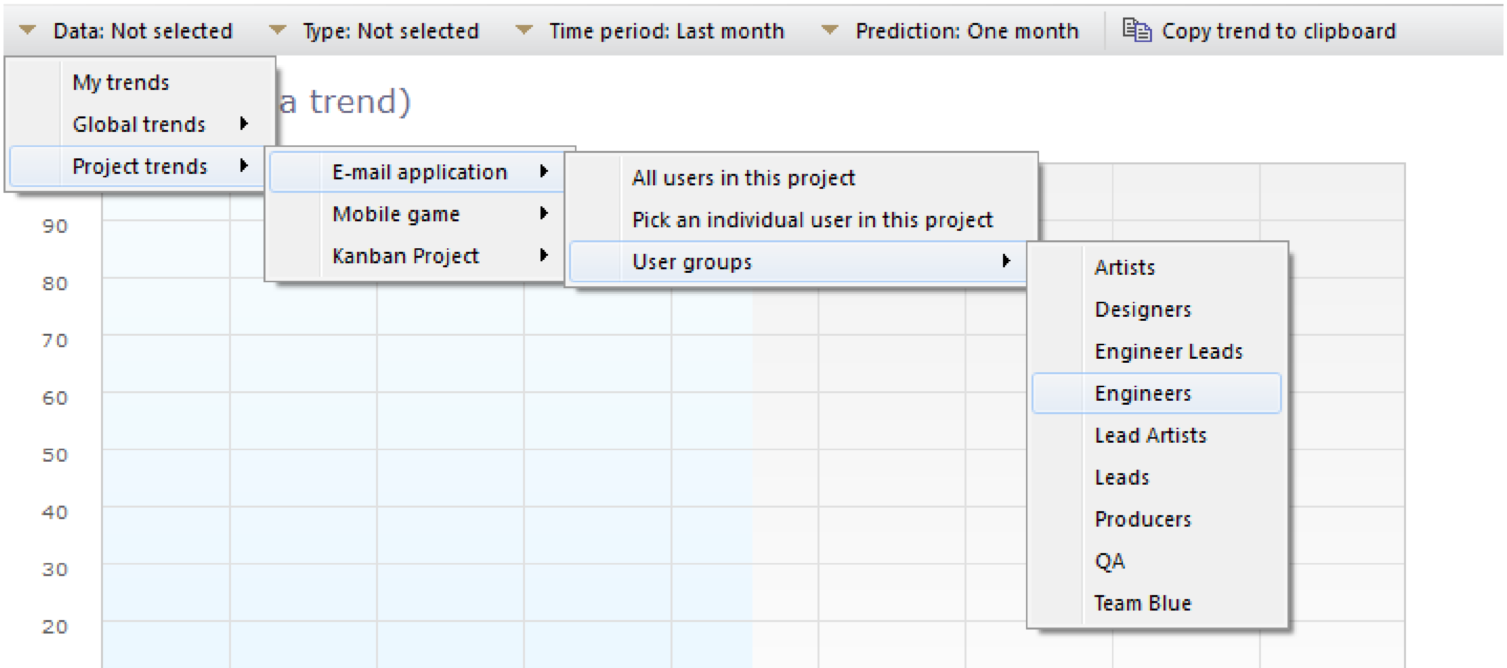
Accessing the trends tool

The trends tool will now open.



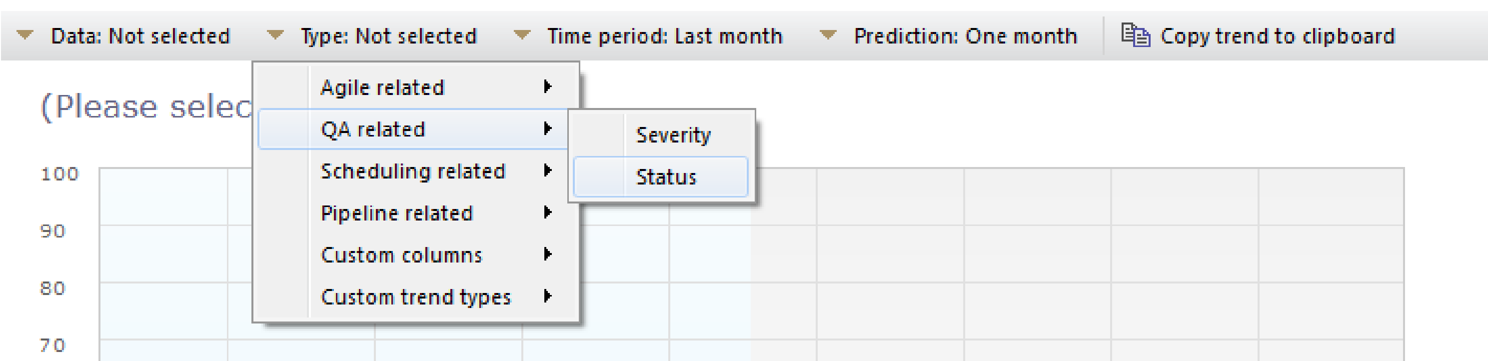
The trends tool

Selecting data is done through the Data menu on the toolbar.



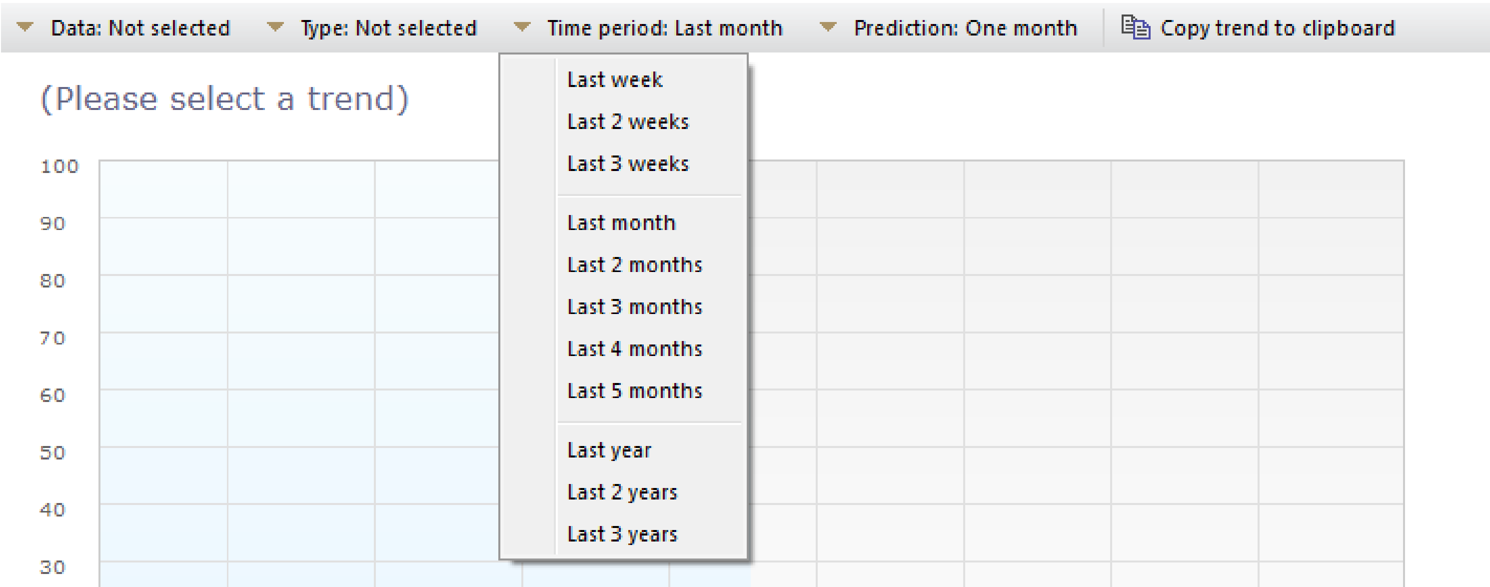
Selecting data in the trends tool

The Type menu displays choices for what type of data to be displayed.



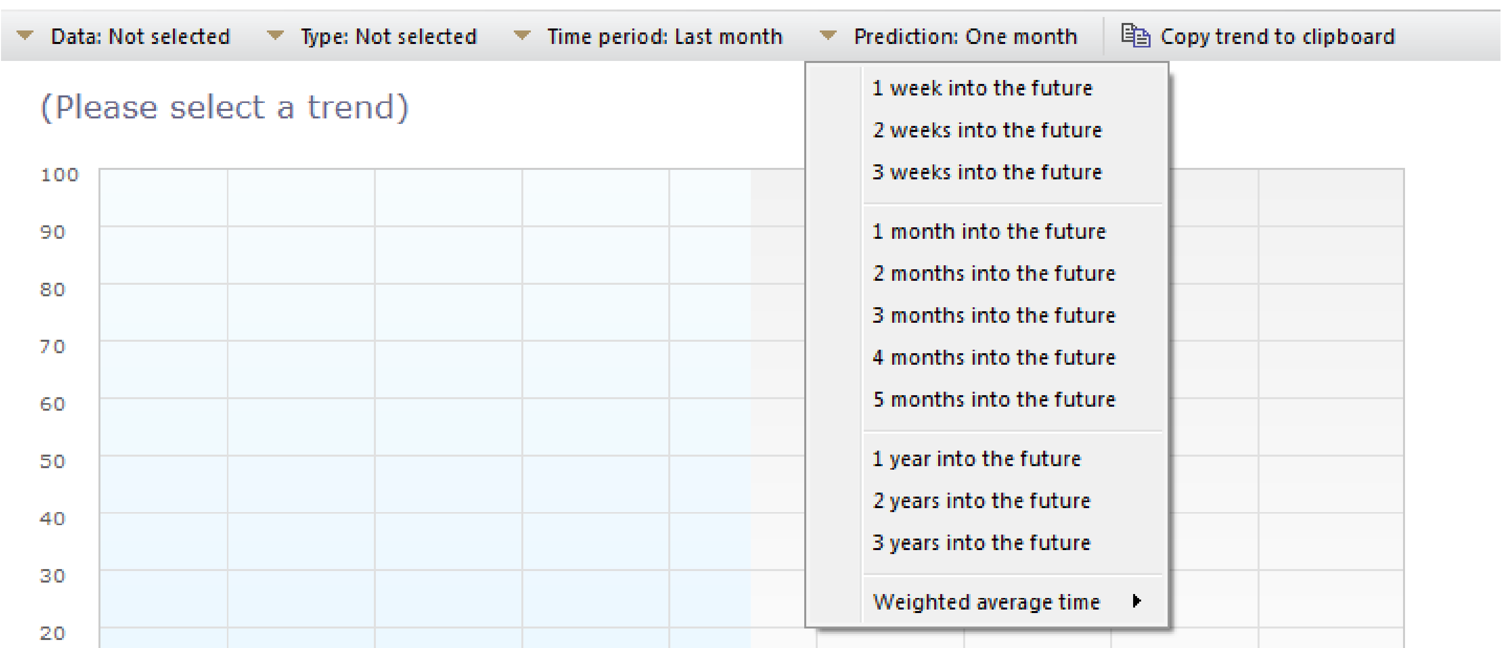
Selecting data type

A variety of time periods can be chosen, relative to the current date.

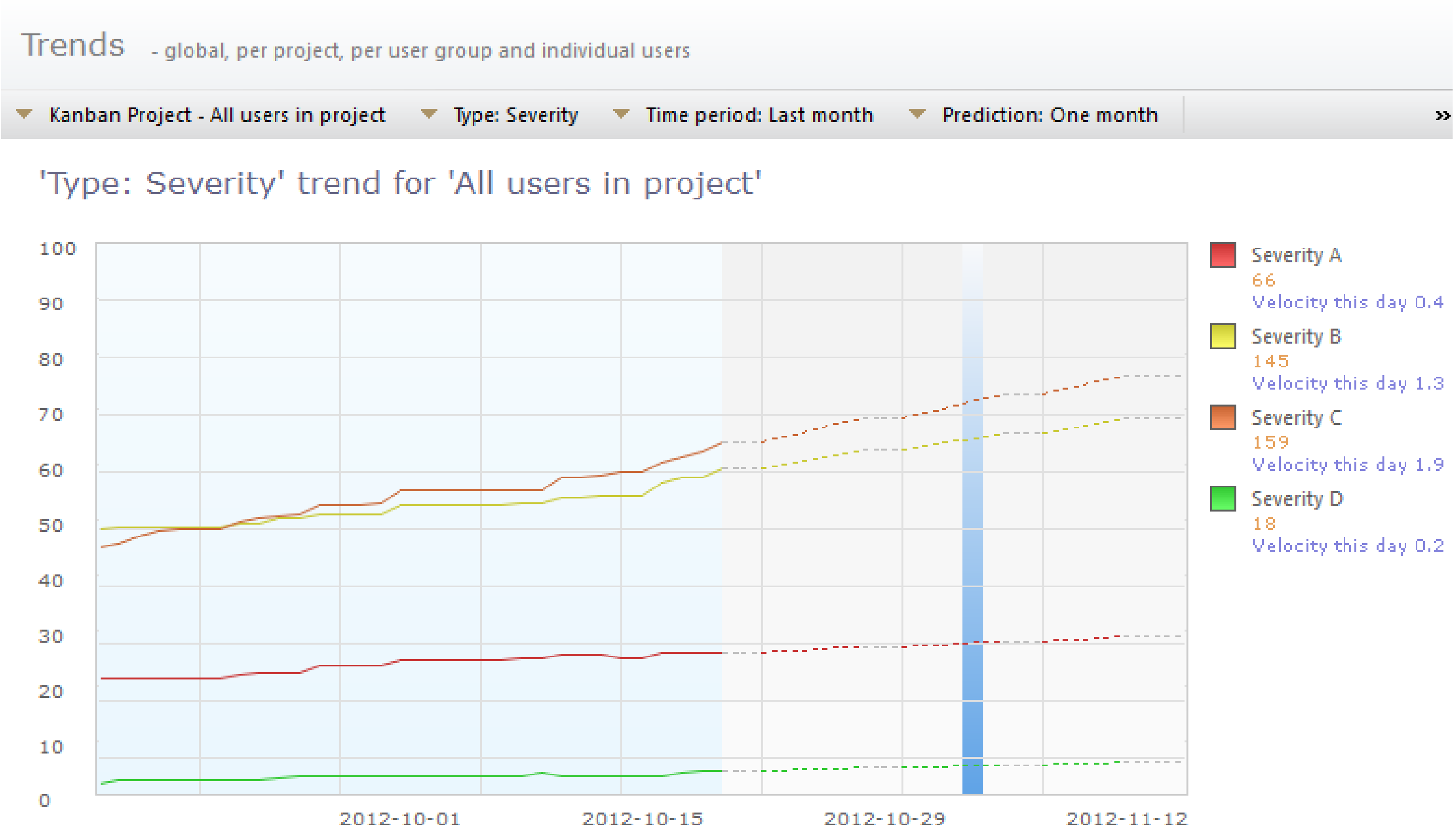


Selecting time period

Selecting a prediction mode will assist in projecting the historical data into the future.

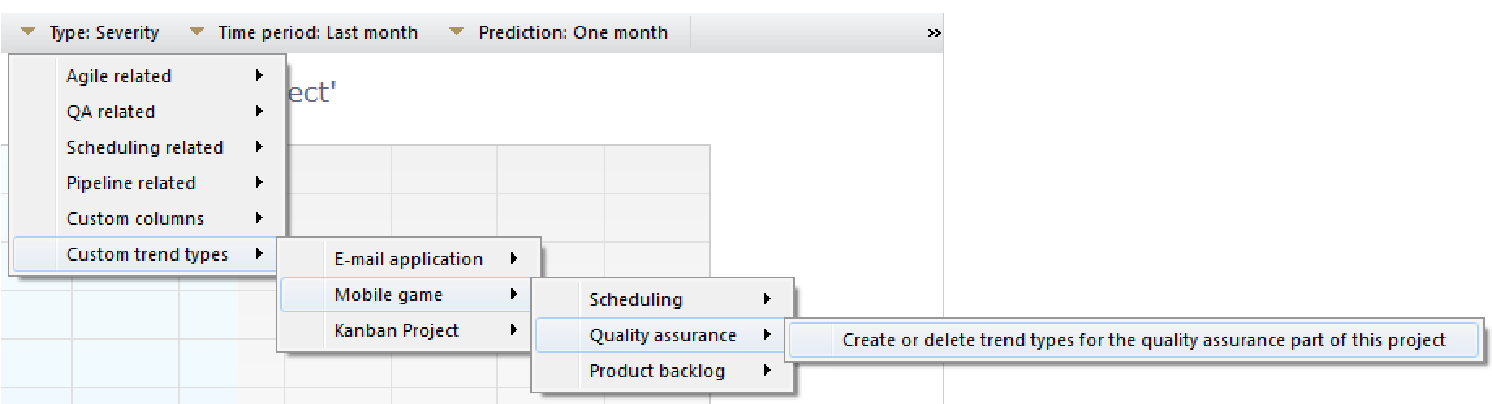


Resulting in a trend with prediction:

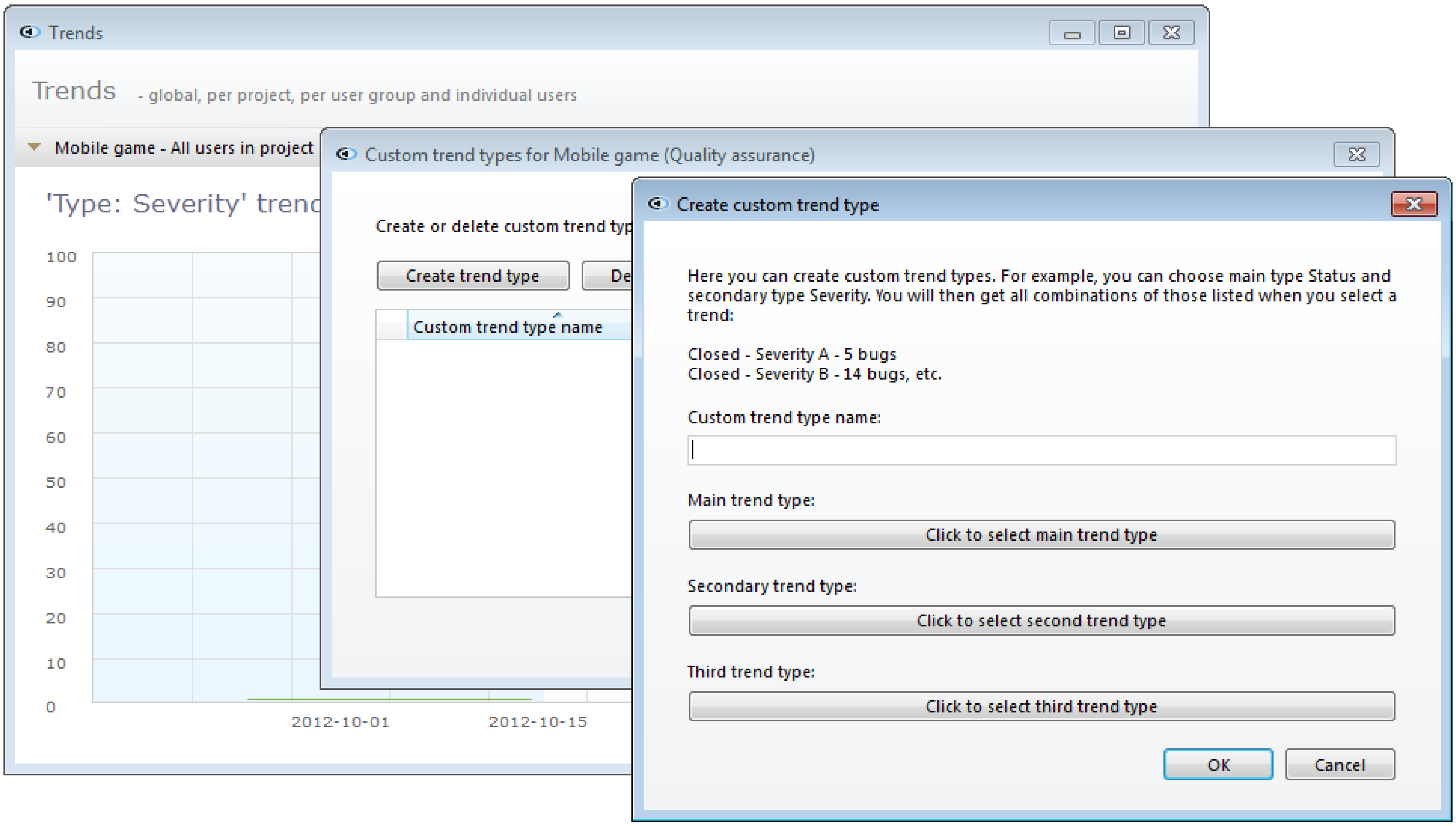


A trend with prediction

You can also create custom trend types. Select "Custom trend types" in the "Type" menu. As an example, you can combine Severity and Bug status, in order to see how many bugs of "Severity A" are "Closed":



Please note that custom trends starts to be recorded when you create them, they are not retroactive. This is because saved data would otherwise fill up the hard drives on the server in a short time period.



QA user accounts

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Hansoft offers a quick and easy way to connect external testers without upgrading your license capacity. This is done by creating QA accounts.

QA accounts can

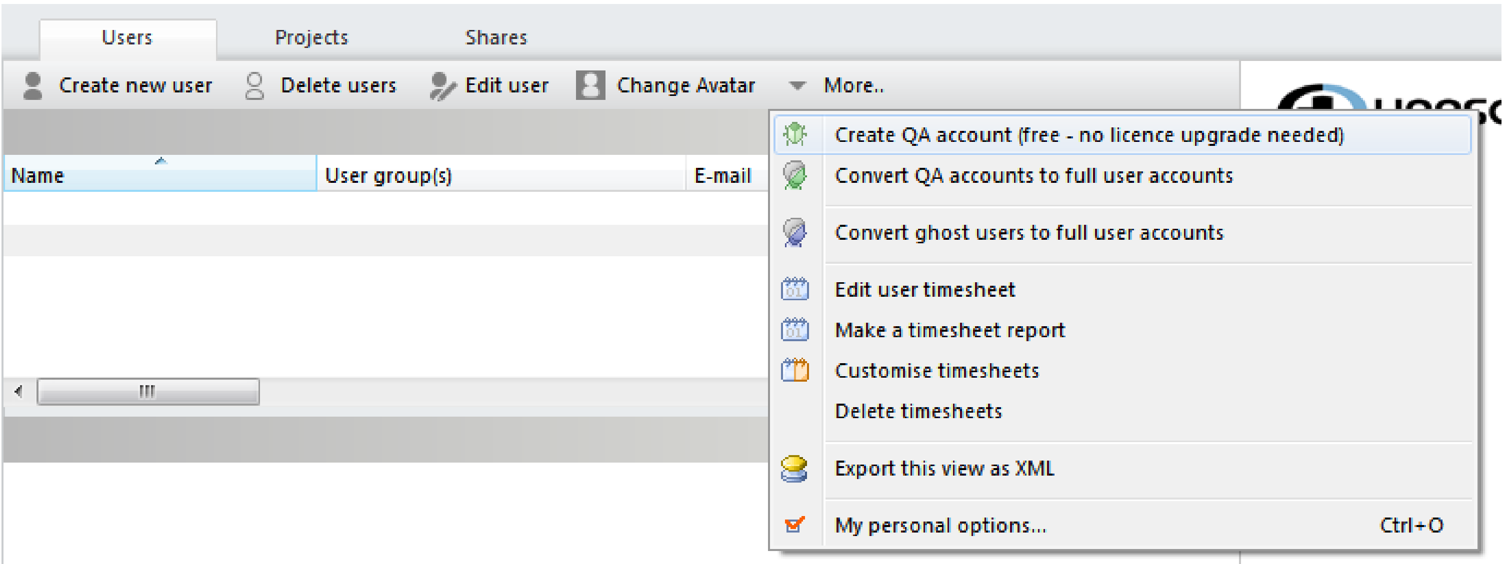
- Log in and report bugs
- Be used as a user in the QA part of a project

QA accounts cannot

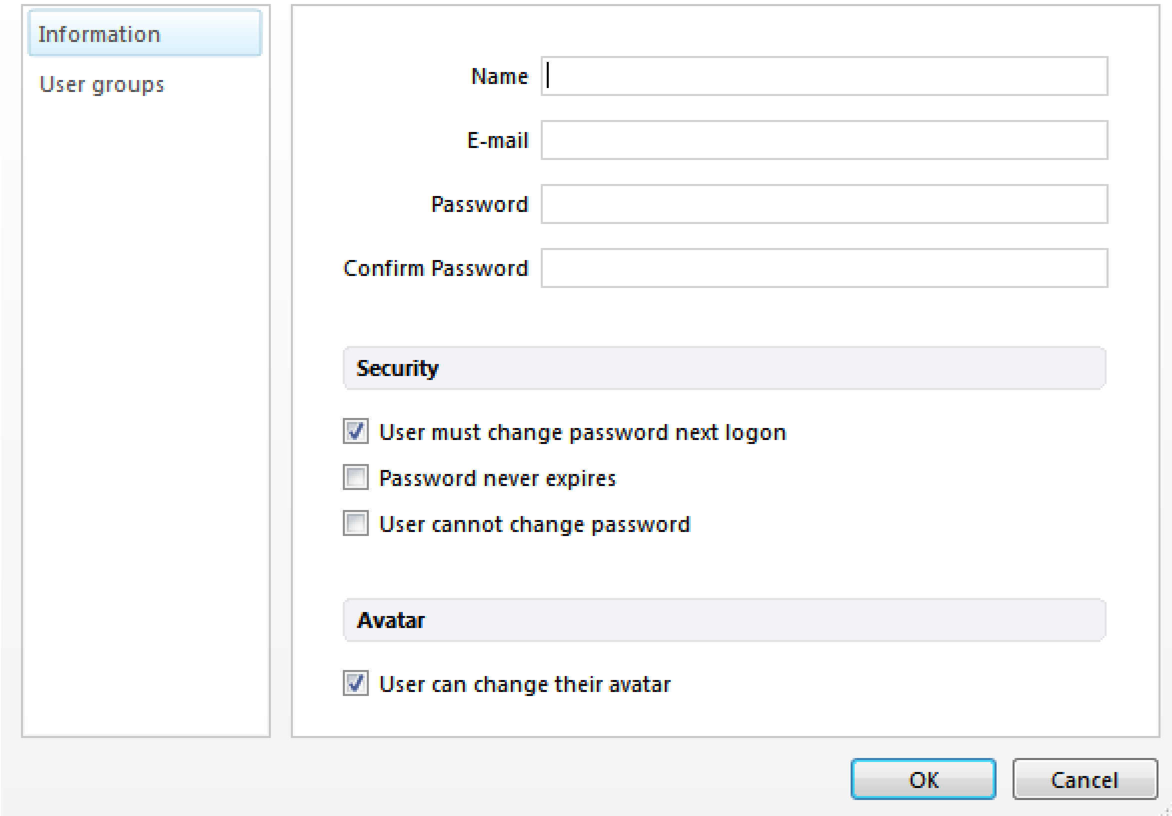
•Access "Portfolio allocations", "Portfolio find" or "Administration"

•Be used as a user in agile or scheduling projects

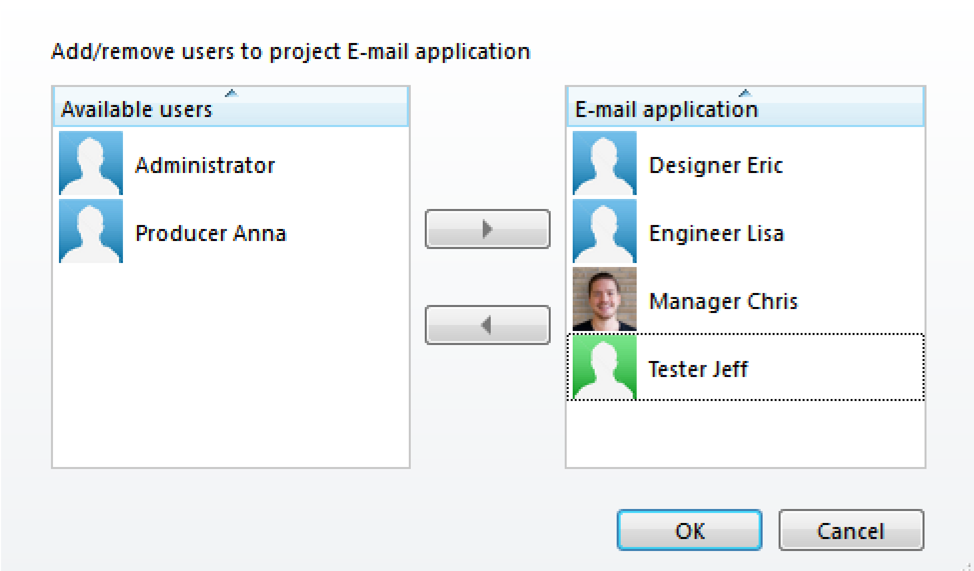
To create QA accounts, you must have administration rights. Go to Administration, Users and then the More menu.



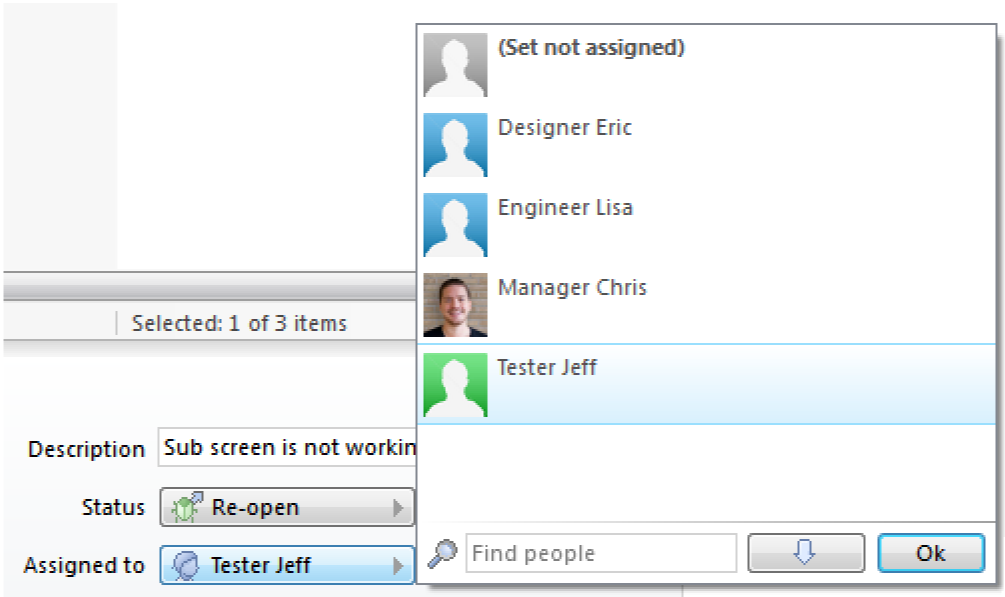
You can create a new QA account and handle it in the same way as normal user accounts:



You then add the newly created user to the project and he/she can be used as a user only in QA (not in scheduling):



The external tester can now be used as a user in the QA part of the project:



Importing TestTrack Pro XML

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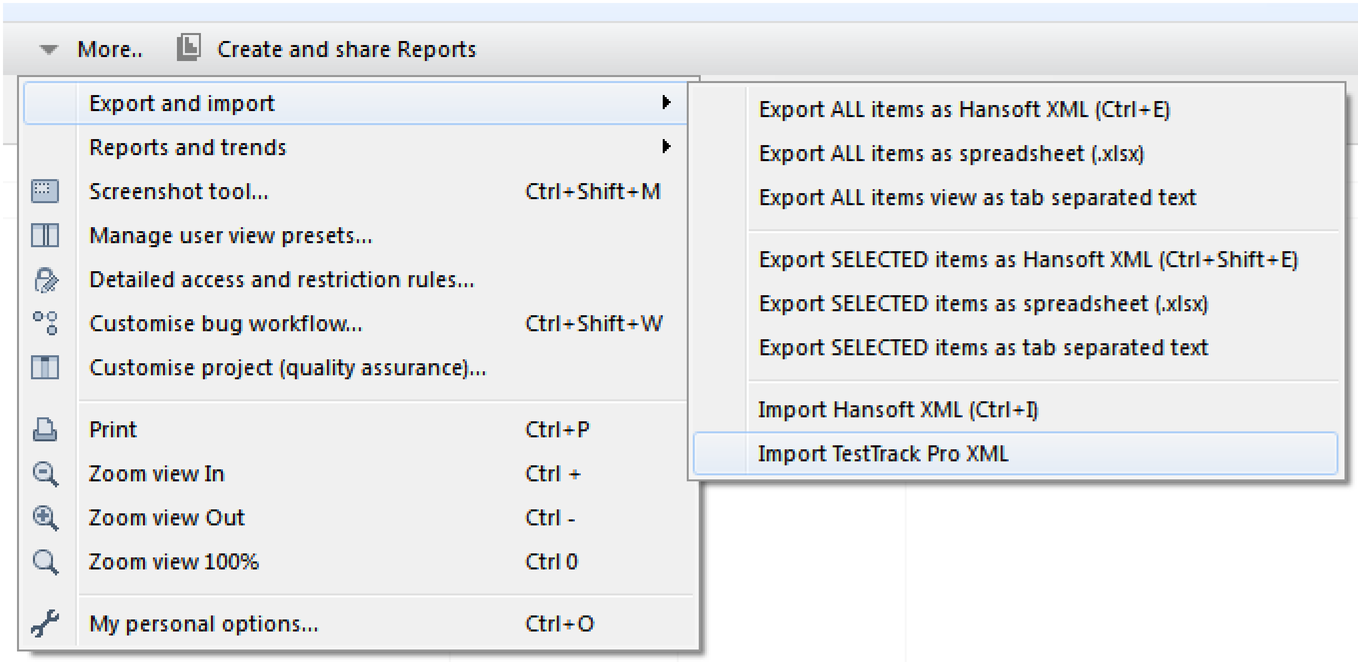
Hansoft offers functionality for importing TestTrack Pro XML directly into Hansoft. You have to be either a Main Project Manager or have a rule granting you access to importing. You must also be able to report new bugs in the workflow.

Go to "More" and "Export and import" and then -> "Import TestTrack Pro XML". Please note that custom column fields will not be created and imported.



Using Find

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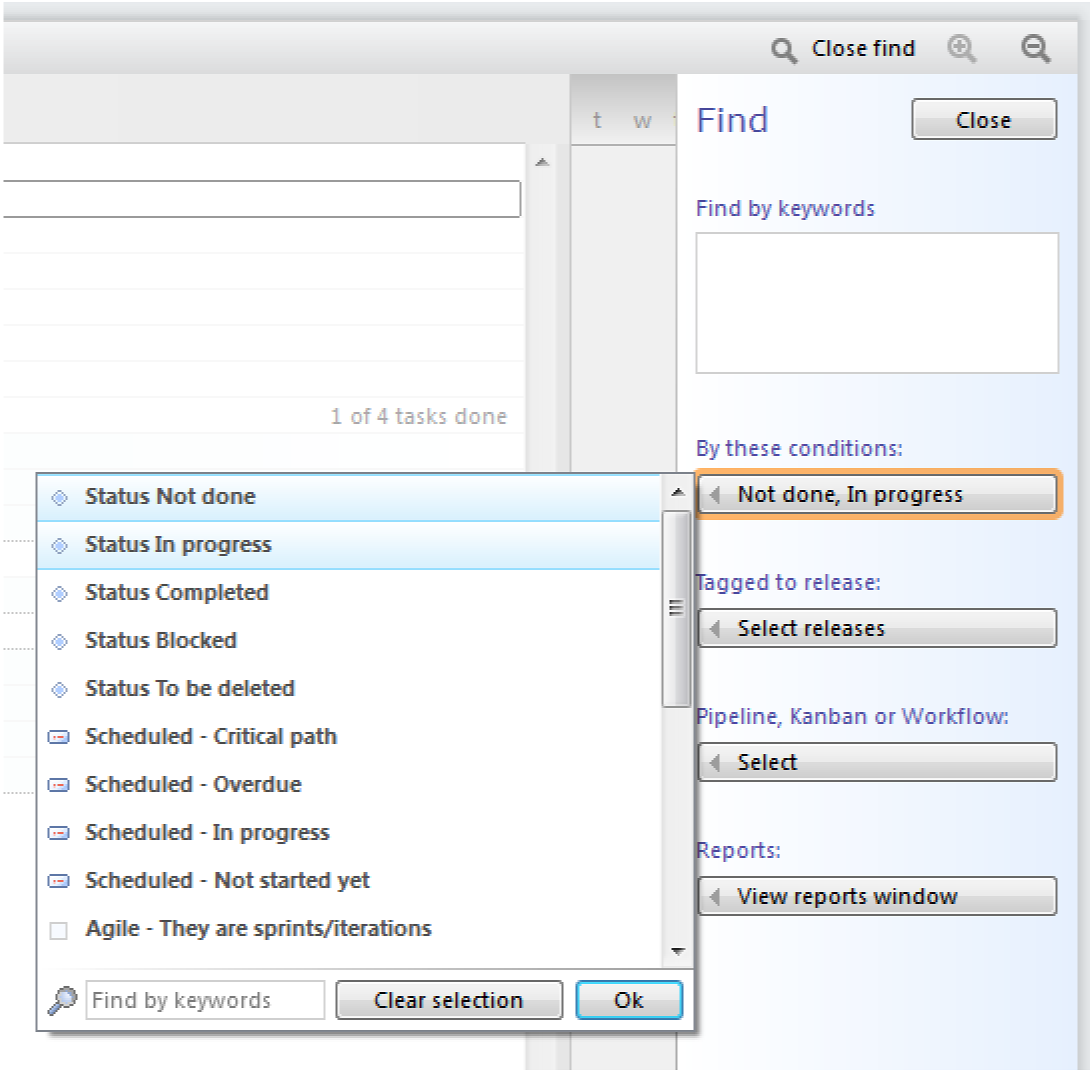
Tip: For more details on how to write find queries, go to the chapter Find query language.

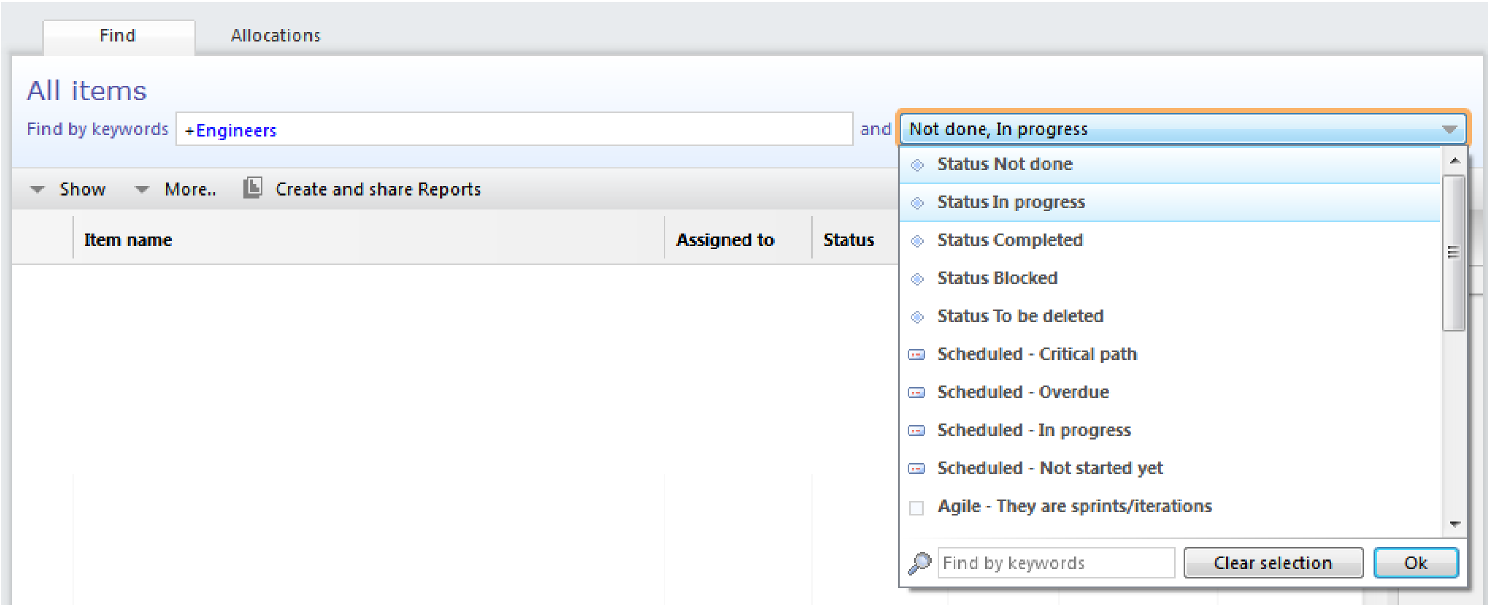
Click on Find on the toolbar or press Ctrl + F (Cmd + F) to open the Find window.

Items can be filtered by a variety of conditions. Beyond simple keyword searches, the Find window can also filter items by pre-defined conditions such as item type or item status. In addition, the Find window can show only items assigned to a particular release, that have a certain workflow or are part of a specific pipeline. Finally, a pre-made report can be invoked.



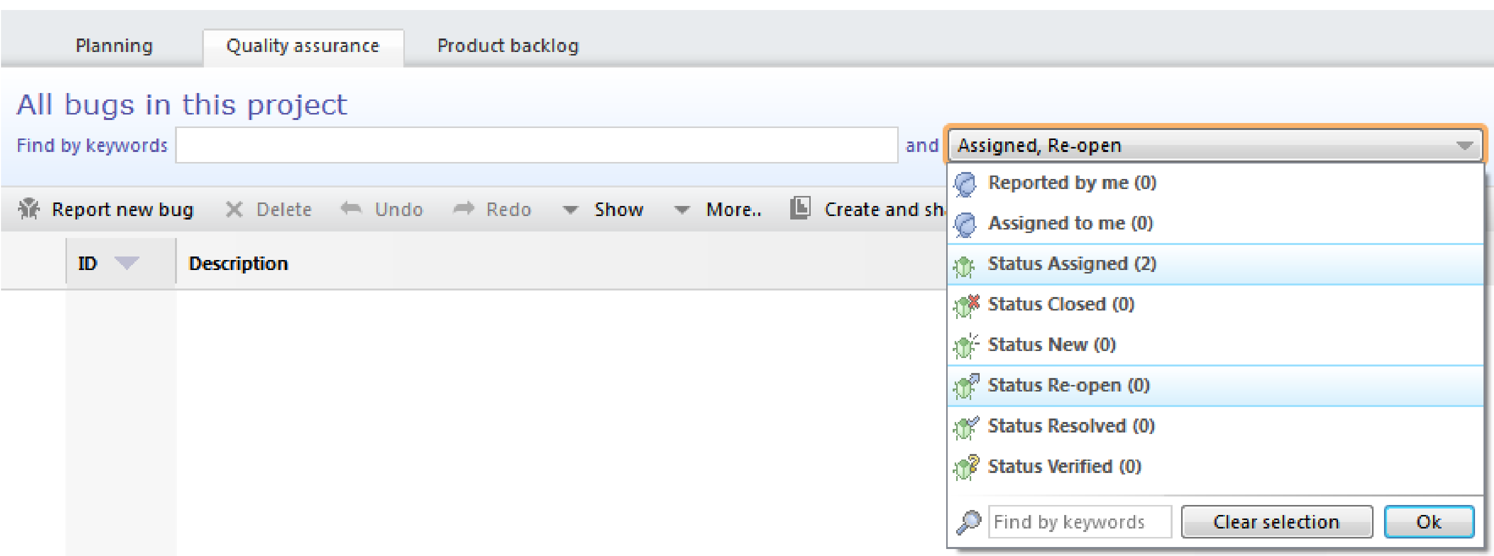
Finding items and tasks in Portfolio find

Find by keywords and select pre-defined conditions. All projects that you are connected to are instantly searched through (this does not include bugs).



Finding bugs

Find by keywords and select bug statuses and pre-defined conditions.



The Find query language

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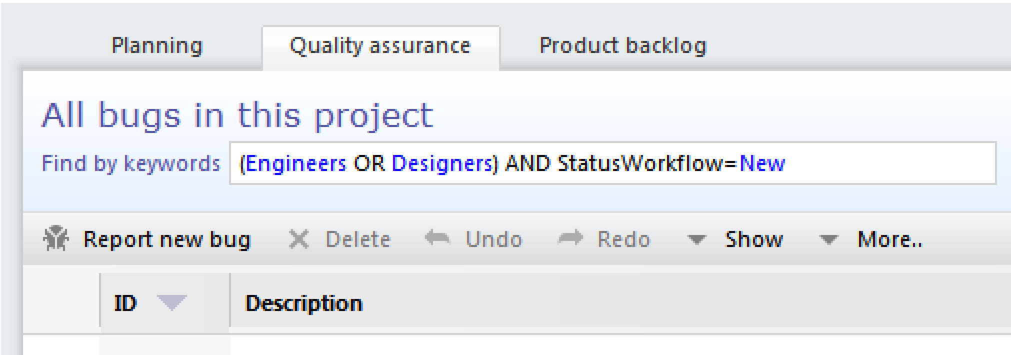
Hansoft has an extensive language for writing queries. This way of writing queries is available everywhere you can

find items, tasks, bugs or other things in Hansoft.



In the report tool you can model your queries in a visual query builder.

Find query language format

Parenthesis ()

(Programmers OR Artists) AND (BugStatus ="New" OR BugStatus ="Assigned")

AND (alternatively +).

(BugStatus = "New" AND WorkRemaining >= 5)

OR

BugStatus ="New" OR BugStatus = "Assigned"

NOT (alternatively !)

NOT BugStatus = "Verified"

- (a combination of AND and NOT)

BugStatus = "New" AND NOT WorkRemaining >= 5

BugStatus = "New" -WorkRemaining >= 5

Finding data in a column

If you write the name of a column before the keyword separated with an operator (such as : which means contains) you can find data only confined within that column.

Description:Code

BugStatus = "New"

Operators and syntax

An operator is written between a column and a keyword. A common operator is : which means contains, for example description:code (result will be all items with a description which contains the keyword code).

Text columns

When finding data in a text column (such as Description), these are the most important operators:

Contains	:
Starts with	=>
Exactly matches	=

Description:Code means all items that contains the text Code.

User columns

When finding data in a user column (such as Users or CC new comments to), these are the most important operators:

Any of selected	:
None of selected	!:
All of selected, no other	=
At least all of selected	<=

users:"Example Team User" means an item where one of the assigned users are Example Team User.

Date columns

When finding data in a date column (such as Start, Finish, a custom date column, last commented on or last updated on), these are the most important operators:

On date	=
After date	>
Before date	<
On or after date	>=
On or before date	<=
Contains	:

start >= 2009-10-01 means start is on or after the October 1st 2009.

Please note that dates has to be written in standard ISO 8601 standard format YYYY-MM-DD. This is because queries written in plain text should not be dependent on local date formatting settings.

Other columns

Finding data in any other column (such as numeric column Work Remaining), at least these operators are available:

Equals to	=
Greater than	>
Less than	<
Greater than equal	>=
Less than equal	<=
Contains	:

Example: workremaining >= 15 means work remaining on agile items are greater than or equal to 15 hours.

Special keywords

mywork and assignedtome gives all work assigned to the logged in user using the keyword

weekX (for example week15 week17) find items that are scheduled during those weeks

fromdatetodate(2008-01-01, 2010-01-01) find dates in the specified range in all columns were it can be applied. Can be combined with now formatting, fromdatetodate(now-15d, now+25d).

Assignedto:Resource("Programmers") finds all items where any column has a member of the user group as value

projects (only in Portfolio find and the To do list, for example "Product Alpha") finds all items within the specified project

Examples

In a scheduling project

(Start >= 2009-03-02 AND Start <= 2009-03-31) AND (Itemname: code OR Itemname: art)

In a agile project

(Itemstatus= "Not done" OR Itemstatus= "In progress") AND (Workremaining >= 1 AND Workremaining <= 10)

In a quality assurance project

(Bugstatus= Assigned OR Bugstatus= New OR Bugstatus= "Re-open") AND
(Severity= "Severity A" OR Severity= "Severity B")

All columns, types and operators

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This is a guide describing how to use the find query language together with all columns, types and operators in Hansoft.

All columns in Hansoft have an ideal type associated with it. For example, both column Work remaining and Earned Value have the type Hours. Detailed description, Item name and Comments have the type Text.

The type describes how to find on a column and it also specifies how the operators work.

Keywords and parameters can be explicitly typed. This means that when Hansoft evaluates the find query it will override the type that would otherwise have been assigned to the keyword or parameter. For example you might want to explicitly type a keyword to Text to avoid it only finding items assigned to a user with the same name you want to search for as text in other fields.

All columns

Column name	Type
Assign tag	Resource
Assigned to	Resource
Budgeted work	Hours
Bug status	Bug status
Category	Backlog category
CC new comments to	Resource
Comments	Text
Committed to sprint	Item
Confidence	Confidence
Custom column date	Time
Custom column drop list	Custom column drop list
Custom column hyperlink	Text
Custom column multi line text	Text
Custom column number	Number
Custom column users	Resource
Custom column text	Text
Database ID	Number
Detailed description	Text
Duration	Days
Earned value	Hours
Estimated ideal days	Days
Finish	Time
General condition - Archived	Boolean
General condition - Assigned to me	Boolean
General condition - Completed	Boolean
General condition - Has resources	Boolean

General condition - Has sub items	Boolean
General condition - Incomplete	Boolean
General condition - Milestone overdue	Boolean
General condition - Not assigned	Boolean
General condition - Out of office task	Boolean
General condition - Ongoing work	Boolean
General condition - User story	Boolean
Hyperlink	Text
ID	Number
Immediate parent sub projects	Item
Immediate sub items	Item
Item name / description / activity name	Text
Item status	Item status
Item type	Item type
Last commented on	Time
Last updated on	Time
Leaf sub items	Item
Linked to item	Item
Milestone / release tag	Item
Originally created / reported by	Resource
Parent sub projects	Item
People	Resource
Pipelines & workflows	Workflow / pipeline and status
Pipeline and Kanban tasks - Can start now	Boolean
Points	Points
Predecessor	Item
Priority tag	Priority
Project	Project
Risk	Risk
Scheduled condition - In progress	Boolean
Scheduled condition - Not started yet	Boolean
Scheduled condition - Overdue	Boolean
Severity	Severity
Start	Time
Steps to reproduce	Text
Sub items	Item
Sub project path	Text
Successor	Item
User story	Text
Work priority	Number

Work remaining	Hours

Text type

The following operators can be used on text:

Description	Operator	Synonyms
Contains	:	
Contains case sensitive	::	
Not contains	!:	
Not contains case sensitive	!!:	
Starts with	=>	
Starts with case sensitive	==>	
Ends with	=<	
Ends with case sensitive	==<	
Equals to	=	
Equals to case sensitive	==	
Not equals to	!=	
Not equals to case sensitive	!!=	
Greater than	>	
Greater than case sensitive	>>	
Less than	<	
Less than case sensitive	<<	
Greater than equal	>=	
Greater than equal case sensitive	>>=	
Less than equal	<=	
Less than equal case sensitive	<<=	

Example

Description = Code returns all items that have a description that exactly matches Code

Explicitly typing

Text(keyword to type)

Example:

Resources:Text("john") returns all items with a resources column containing the text john

Number types

The following operators can be used on a number:

Description	Operator	Synonyms
Equals to	=	== : :: => ==> =< ==<
Not equals to	!=	!!= !: !!:
Greater than	>	>>
Less than	<	<<
Greater than equal	>=	>>=
Less than equal	<=	<<=
Contains (needs explicit typing to text, see example below)	:	

Example

DatabaseID = 1193 returns the item that has Database ID 1193

DatabaseID:"11" returns items that has a Database ID which contains number 11

Explicit typing

Number

Example:

Estimatedidealdays >= 5.30

returns all items that have estimated ideal days greater than or equal to 5.30

Boolean Types

Boolean columns can either be of value true (represented by number 1) or false (represented by number 0).

The following operators are ideally used on columns typed as boolean:

Equals to	=
Not equals to	!=

Since the Boolean column returns a number, the operators for the Number type can also be used.

Example

ScheduledconditionInprogress = 1 returns all scheduled tasks that are currently in progress

Explicitly typing

true or false

Example:

ScheduledconditionOverdue = true

returns all scheduled tasks that are overdue

Hours and Days types

Hours and days are used on columns such as Duration and Work remaining and are specified by a d for days and h for hours in the end of a number.

If you write no letter after the number Hansoft will auto type to the default type for that column (for example Duration will auto type to days if you write Duration > 5).

Days and hours can be converted between each other so you can search for example Duration > 16h and it will automatically convert the duration expressed as days to hours. The conversion always assumes 8 hour days.

Operators for use with Hours or Days type:

Since the Hours and Days are a number, the Number type operators apply.

Example

Duration > 5d returns all scheduled tasks that have a duration longer than 5 days

Explicit typing

Xd for days

Xh for hours

Example:

Work remaining <= 3.5d

returns all items that has work remaining less than or equal to three and a half days

Points type

The following operators can be used on points:

Since points are expressed as a number, the Number type operators apply.

Example

Points > 20 returns all items with more than 20 points

Explicit typing

Xpoints

Example of explicit typing

Points <= 10points returns all items with less than or equal to 10 points

Item type

The type item specifies one or several of any kind of item, task or bug in Hansoft.

Operators

Description	Operator	Synonyms
Any of items	:	::
Any of items, some other	>	>>
Any of items, no other	<	>>
None of items	!:	
None of items, some other	!!:	
All of items, no other	=	==
None of items or some other	!=	!!=
All of items, some other	>=	>>=
At least all of items	<=	<<=
First is any of items	=>	==>
Non-first are any of items	=<	==<

Example

Committedtosprint = "Email application - Prototype" returns all items committed to sprint "Email application - Prototype"

Explicit typing

Item([ST, M, BI, AT, S, SP, B]"task name", ...)

ST is a Scheduled task

M is a Milestone

BI is a Backlog item

AT is a Agile task

S is a Sprint

SP is a Sub project

B is a Bug

Example of explicit typing

Linkedtotaskitembug : Item(BI"As an application user, I can reply to emails")

returns all items linked to backlog item (BI) "As an application user, I can reply to emails"

Linkedtotaskitembug = Item(BI"As an application user, I can reply to emails")

returns all items linked to ONLY backlog item (BI) "As an application user, I can reply to emails"

Linkedtotaskitembug : Item(BI"As an application user, I can reply to emails", BI"As an application user, I can forward emails")

returns all items linked to backlog item (BI) "As an application user, I can reply to emails" or backlog item (BI) "As an application user, I can forward emails"

Resources type

The type people specifies both individual users and user groups.

The following operators can be used on people:

Description	Operator	Synonyms
Any of selected	:	::
Any of selected, some other	>	>>
Any of selected, no other	<	>>
None of selected	!:	
None of selected, some other	!!:	
All of selected, no other	=	==
None of selected or some other	!=	!!=
All of selected, some other	>=	>>=
At least all of selected	<=	<<=
First is any of selected	=>	==>
Non-first are any of selected	=<	==<

Example

assignedto = "Example Proj Manager"

returns all items that have only "Example Proj Manager" assigned

Explicit typing

R specifies individual resource and is written before the typed keyword

G specifies a resource group and is written before the typed keyword

resource([R or G]"keyword to type", [R or G]"keyword to type" etc.)

Example:

CCnewcommentsto:resource(G"Business Unit 3", R"Example Proj Manager")

returns all items that have a CC to a user in user group "Business Unit 3" or to the individual user "Example Proj Manager"

Using the currently logged in user as a resource type

loggedinresource

Example:

assignedto:Resource(loggedinresource)

Time type

The time type is used for all kinds of date columns such as Start and Last Commented on. All dates are specified in the ISO 8601 format YYYY-MM-DD.

The following operators can be used on dates and times:

Description	Operator	Synonyms
On date	=	== : :: => ==> =< ==<
Not on date	!=	!!= !: !!:
After date	>	>>
Before date	<	<<
On or after date	>=	>>=
On or before date	<=	<<=

Example

Start >= 2009-10-01 returns the scheduled tasks that have a start date on or after 1st of October 2009

Explicit typing

Time

Example:

Finish <= 2009-10-05

returns the scheduled tasks that have a finish date on or before 5th of October 2009

Syntax

There are three ways to specify a date.

Gregorian date and time	YYYY-[MM[-DD]][:HH[:MM[:SS]]]
ISO week, day and time	YYYY-['W'WW-[D]][:HH[:MM[:SS]]]
Offset from the current time	Now[(+,-)X(Y,M,D,W,H,m,S)][:HH[:MM[:SS]]]

A date is recognized as such when an integer with a - after is found. You don't need to specify the whole date and time, but can stop at any precision (see below). You cannot include any white space within the date expression and thus need to write the whole date without any spaces.

When searching on dates or time the keyword now can be used (start >= now). Together with keyword now you can also add + or - and

Second	s
Minute	m
Hour	h
Day	d
Week	w
Month	M
Year	y

Example of now syntax

Start > Now-3M

returns scheduled tasks with a start date greater than three months ago.

LastUpdatedOn > Now-2h AND LastUpdatedOn <= Now

returns all items, tasks or bugs updated the last 2 hours.

Precision

When specifying a date or time it will implicitly have a precision attached to it. The precision is determined by the amount of accuracy that the date is specified with.

The precision of the time/date determines the range of time that the search sees as a match. If you for example specify a specific hour (2008-08-09:19) all times that fall within that hour will be matched in the search.

Precision examples

Syntax	Accuracy
2008-	Year
2008-08	Month
2008-08-09	Day
2008-08-09:19	Hour
2008-08-09:19:30	Minute
2008-08-09:19:30:11	Second
2008-W5	Week
2008-W5-1	Day
2008-W5-1:09	Hour
2008-W5-1:09:30	Minute
2008-W5-1:09:30:11	Second
Now	Second
Now+1y	Day
Now+1.5y	Day
Now+1M	Day
Now+1.5M	Day
Now+1w	Day
Now+1.5w	Hour
Now+1d	Day
Now+1.5d	Hour
Now+1h	Hour
Now+1.5h	Minute
Now+1m	Minute
Now+1.5m	Second
Now:09	Hour
Now:09:30	Minute
Now:09:30:11	Second

Ranges

You can also specify a time range when specifying time. This is done with the FromDateToDate keyword.

Example

Start = FromDateToDate(now-2y, now+1y)

returns scheduled tasks with a start date from two years ago to one year into the future.

Drop list types

The drop list types are

- Confidence
- Severity
- Priority
- Item status
- Risk
- Backlog category
- Item type
- Project
- Bug status
- Custom column drop list
- Workflow
- Workflow Status
- Pipeline

Pre-defined and custom drop lists all follow the same pattern with regards to how to find on them. Please note that the drop lists here are separate types.

The following operators are ideally used on drop list types:

Equals to	=
Not equals to	!=

Since the drop list types are represented as a number, the operators for the Number type can also be used. This can make sense when the drop lists have a specified order such as Severity. You could then search for all items that have a severity worse than or equal to B: Severity <= Severity(B)

Example

Confidence = "High confidence"

ItemStatus != Completed

Project = "Development project"

BugStatus = Assigned

MyCustomColumnDropList = "Drop list item A"

Pipeline = Cutscene

Workflow = "Sign off"

Explicit typing

Confidence(High, Medium or Low)

Risk(High, Medium or Low)

Priority(High, Medium or Low)

BacklogCategory("Requirement", "Enhancement", "Technology upgrade", "Bug (A)", "Bug (B)", "Bug (C)" or "Bug (D)")

Severity(A, B, C or D)

ItemStatus("Not done", "In progress", "Completed", "Blocked" or "To be deleted")

ItemType("Scheduled task", "Milestone", "Backlog item", "Agile task", "Sprint", "Sub project" or "Bug")

Project(Project name)

BugStatus([Project name], Bug status name)

ColumnDrop(Column Name, Custom drop list item name)

Pipeline([Project name], Pipeline name)

Workflow([Project name], Workflow name)

WorkflowStatus([Project name], Workflow name, Workflow status)

When searching in the To do list or Global find the [Project name] mentioned above is relevant, because in these circumstances you need to specify the project you want to specify for example a bug status from.

When explicitly typing drop list types some of the values are fuzzily matched. For example BacklogCategory("Bug (A)") is the same thing as BacklogCategory(BugA) or BacklogCategory("A Bug").

Example of explicit typing

Severity(A)

returns all bugs that has Severity A

Project("My game project")

returns all items in project "My game project"

Pipeline("Cutscene")

Pipeline("My project","Cutscene Generic")

WorkflowStatus("Sign off", "First sign off status")

WorkflowStatus("My project", "Sign off", "First sign off status")

Column type

It is possible to compare two different columns by using the column type.

Example

Workremaining > Column(Estimatedidealdays)

returns all items where the work remaining exceeds the estimated ideal days.

Creating and sharing reports

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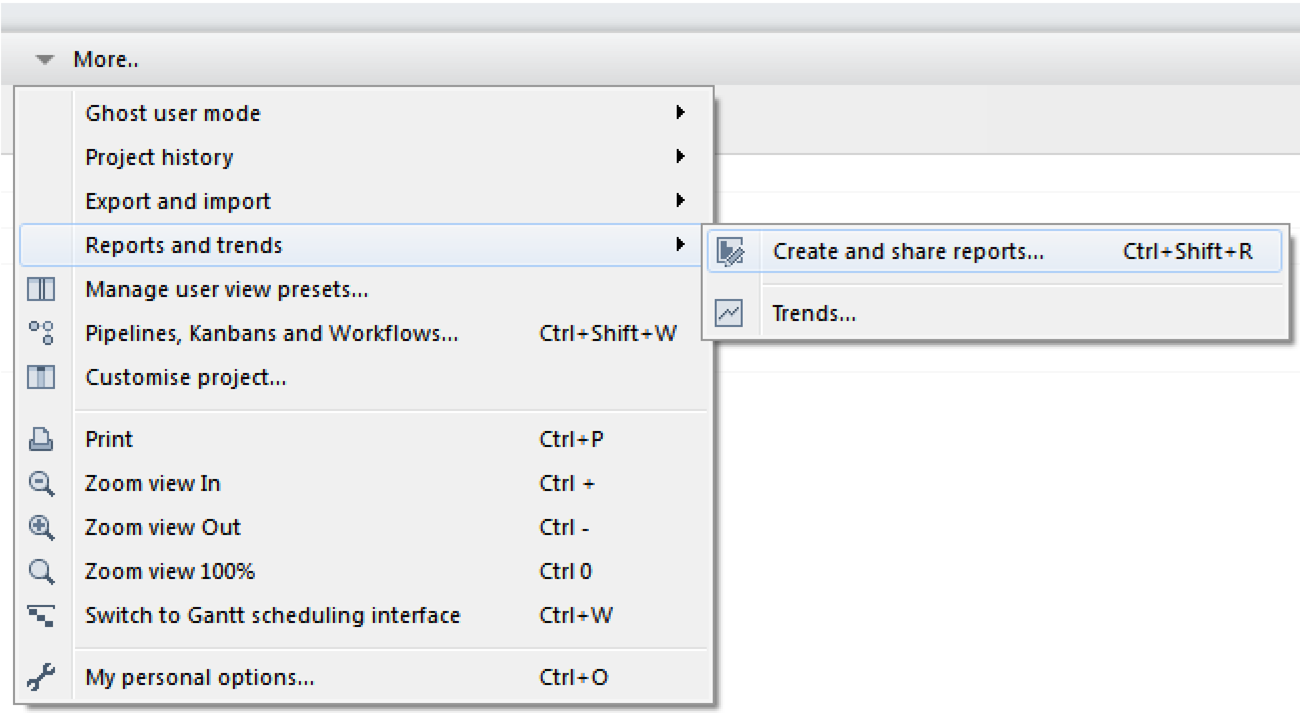
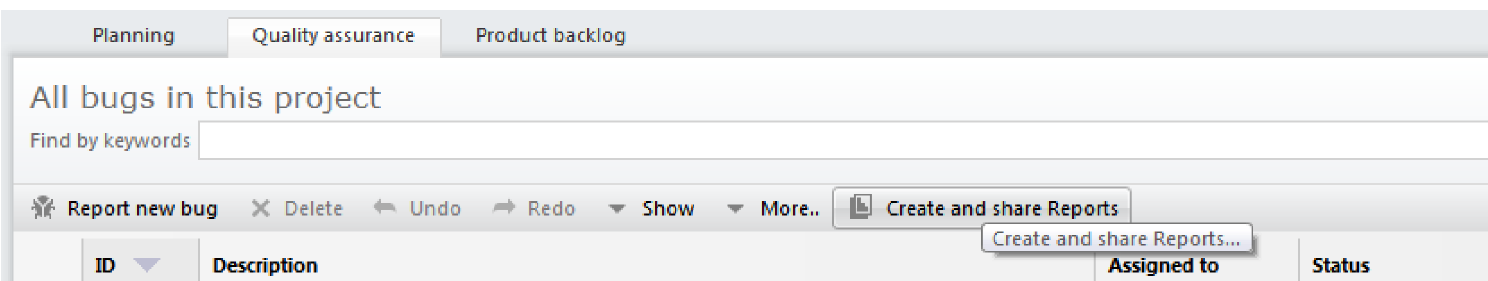
Hansoft has extensive functionality for creating and sharing reports.

The report tool is found under the Reports and trends menu. This menu is present in the More menu in any project or backlog view.



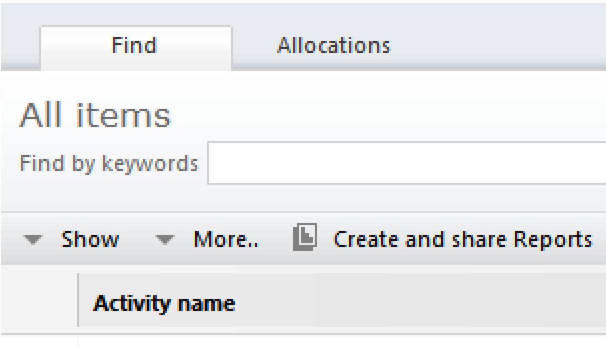
Accessing the Report tool from the project or backlog view

It is also found on the main toolbar as Create and share Reports in QA if you are a main project manager or have rules allowing you to share reports:



Accessing the report tool from the QA section of the project view

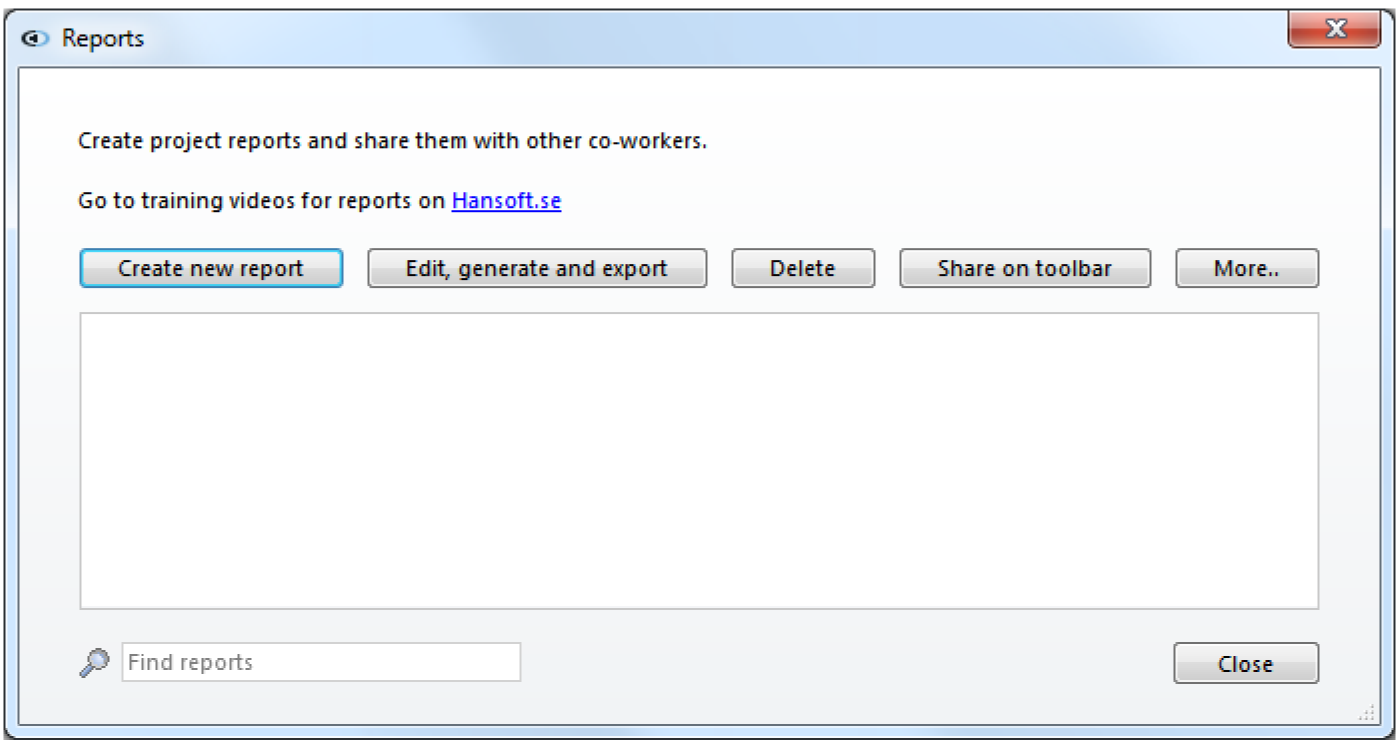
Additionally, it is also found on the main toolbar as Create and share Reports in Portfolio find if you have administration status as a user:



Accessing the report tool from the Portfolio view

Managing reports

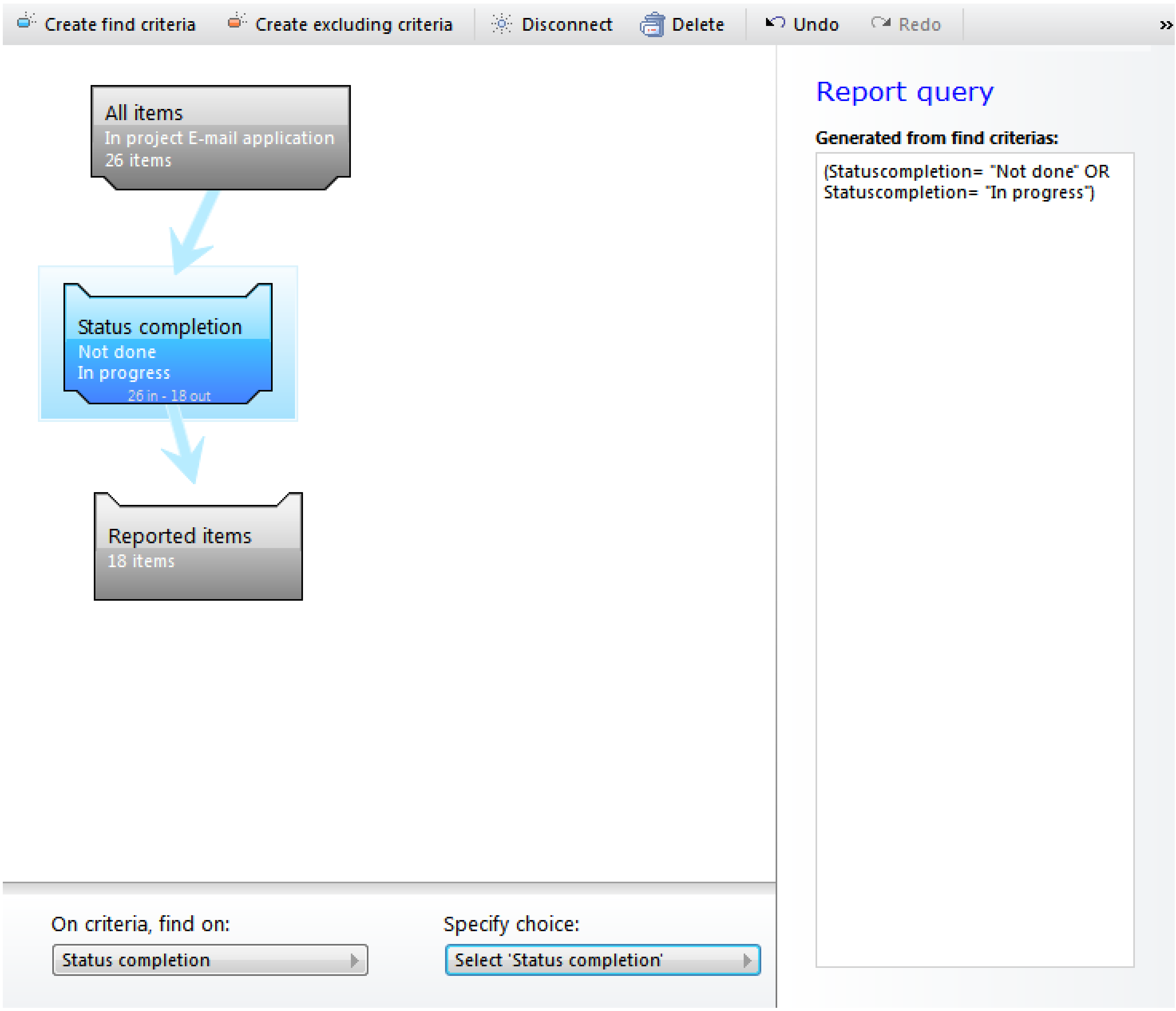
Reports can be created and managed by all users in Hansoft. These personal reports can then be shared with other users and user groups. In the view below you also duplicate reports if you want to make a variation of already existing report.



The report tool

Editing and generating a report

When editing a report you have access to a visual query builder, sorting results, grouping results. After editing the report it will automatically update the results in the background project view. The report results can also be exported as XML, spreadsheet or tab separated text.



Building a query

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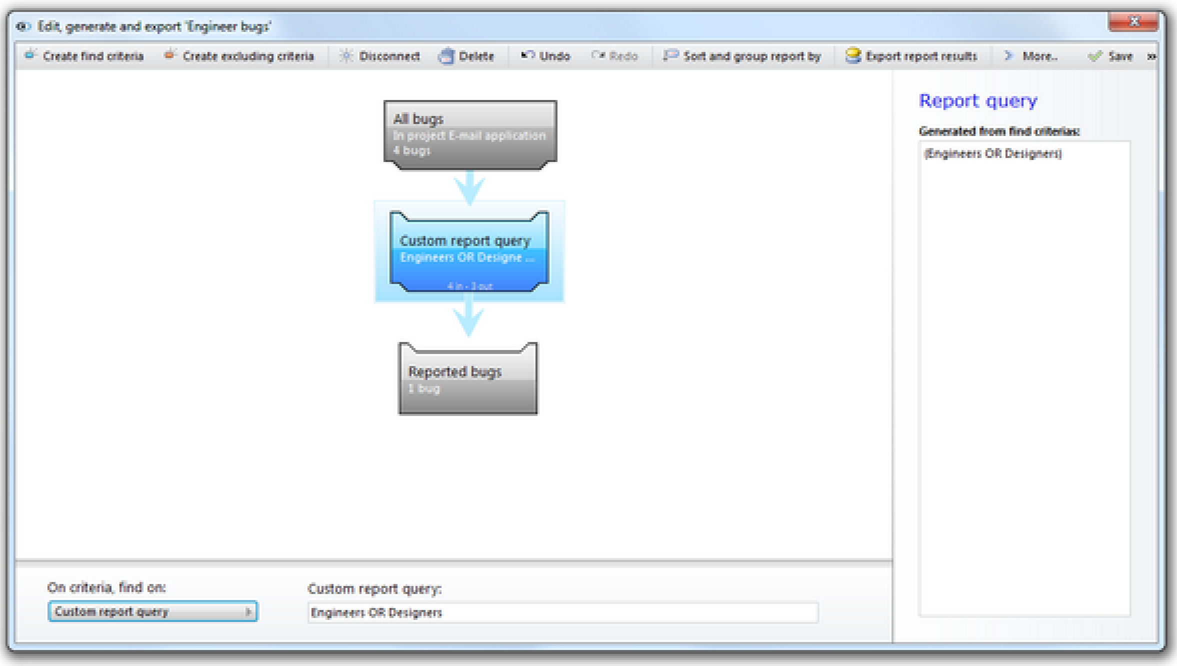
Building a query

Building a query is the first step when doing a report. A query find the tasks, items or bugs that you want to be included in the report.

The end result of the visual query builder is a report query that is in the same format as Hansoft's Find query language.

When building a query, think of water pouring from the top to the bottom and filtered in between to sort out everything you do not want.

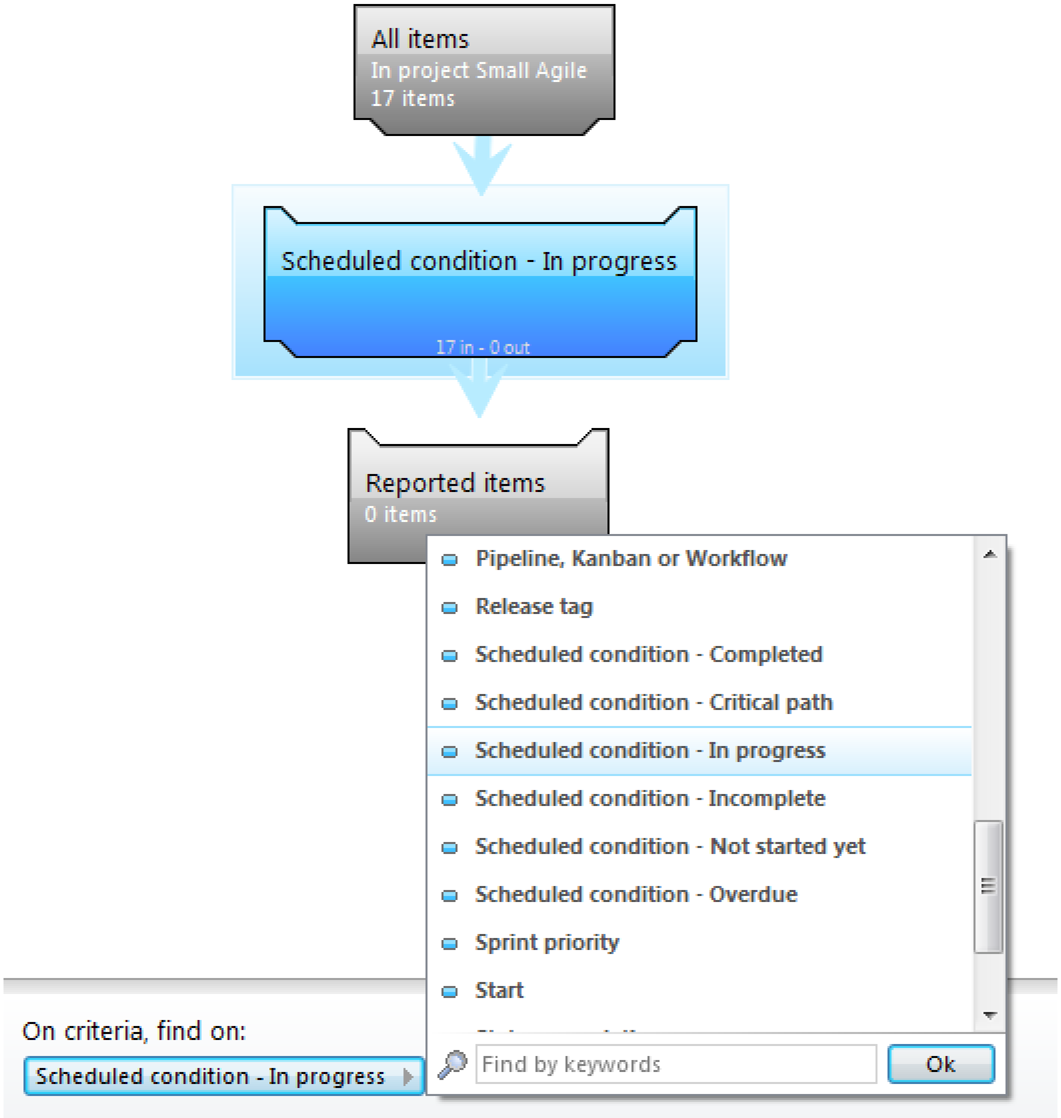
First there is All items in the project, then we have different find criteria sorting out items you do not want, and in the end there is Reported items which is the end result.



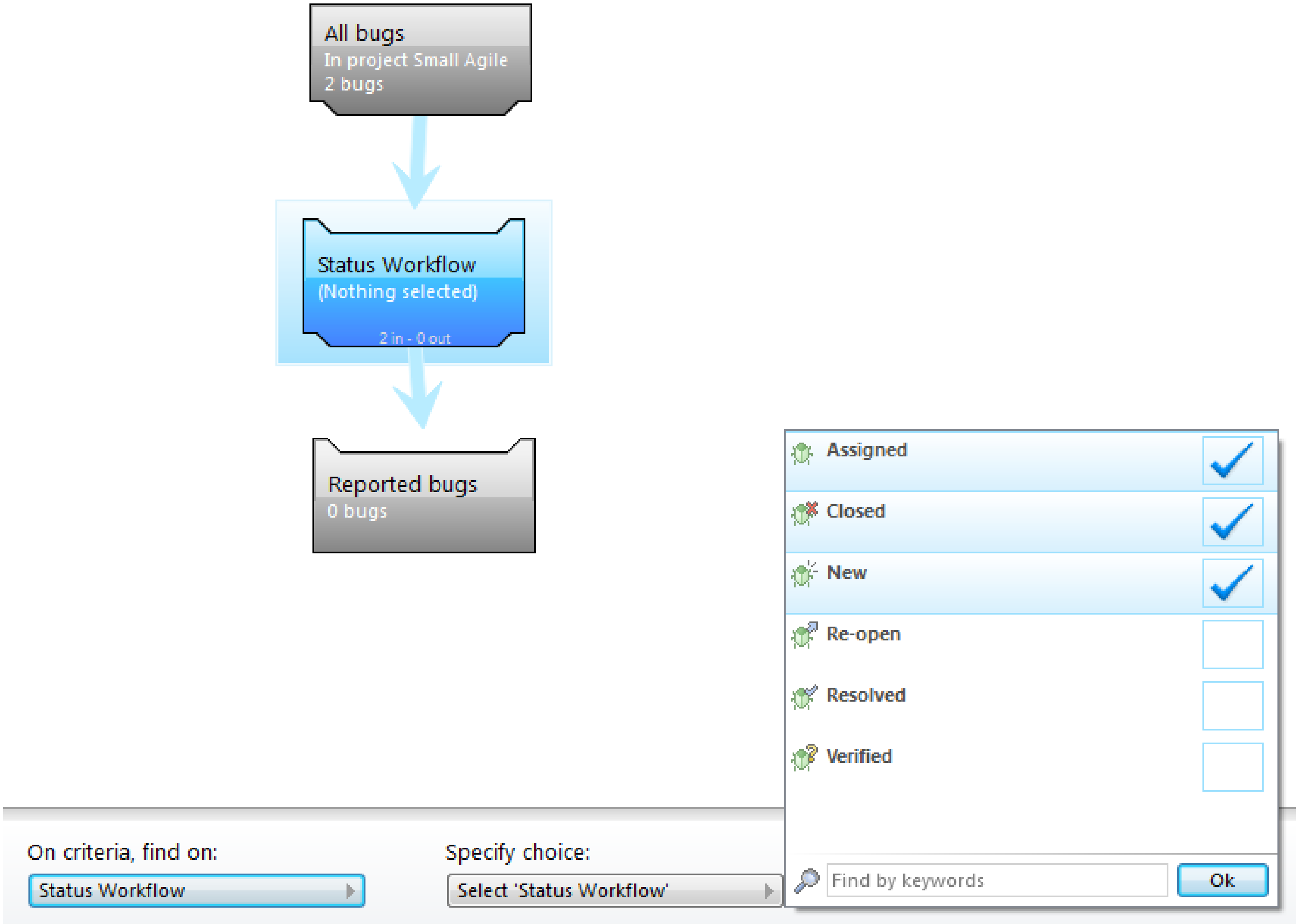
Find criteria

A find criteria is the element between All items and Reported items. After you created a find criteria you select what to find on from available columns. On each column you then select on what to specifically search for.

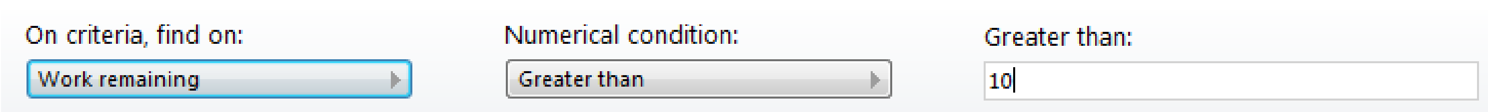
For example, finding Item status 'Not done':



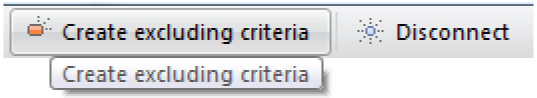
Bug status Assigned, Closed or New:

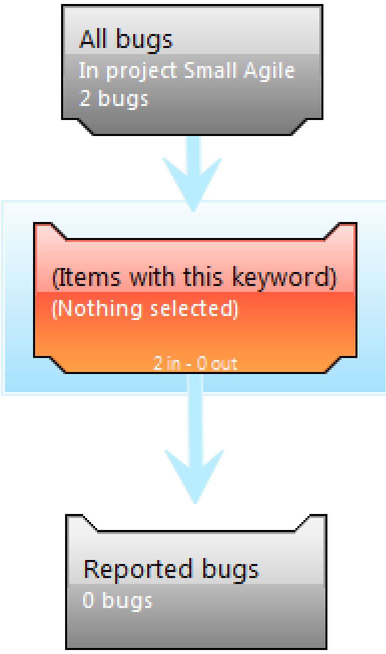


Or work remaining greater than 10 hours:



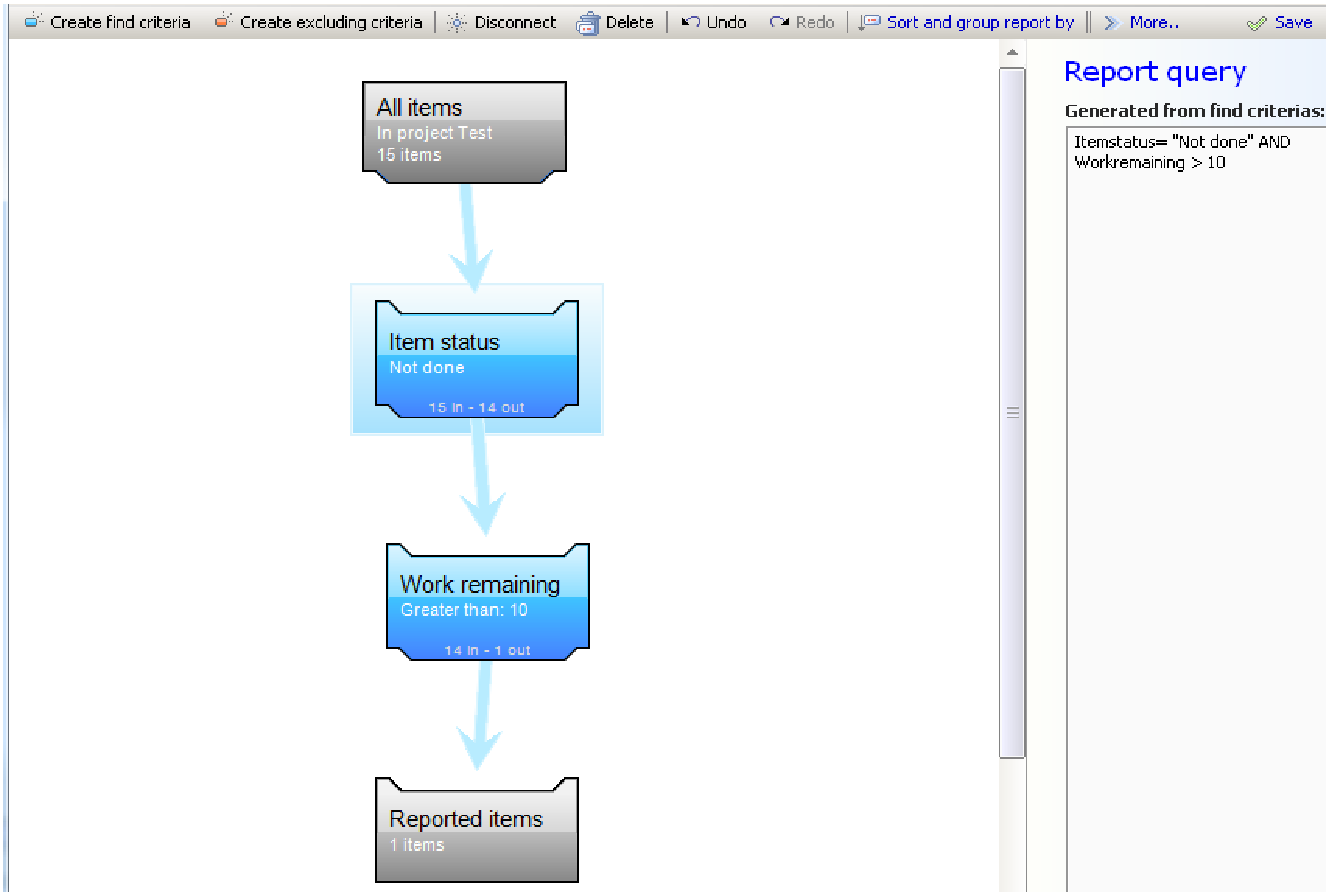
You can also create an excluding criteria. This means that everything that comes to the criteria has to NOT be what is specified (NOT ItemStatus = "Not Done") in order to pass through.



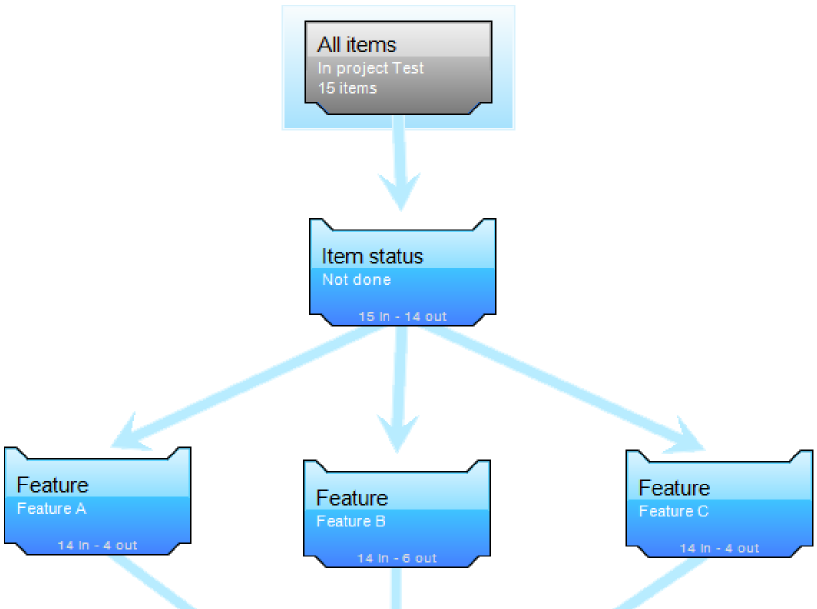


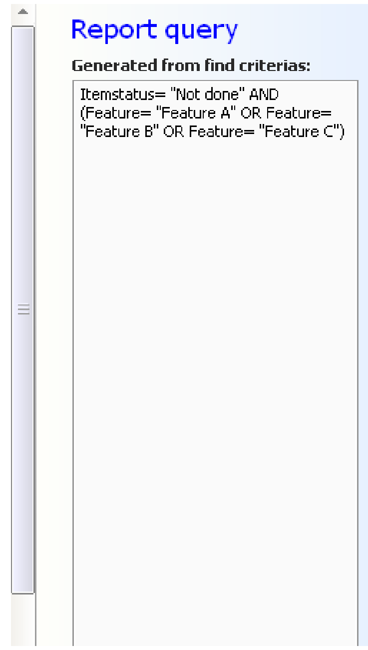
Query logic

Creating a criteria after another means logically AND (see query language for more references).

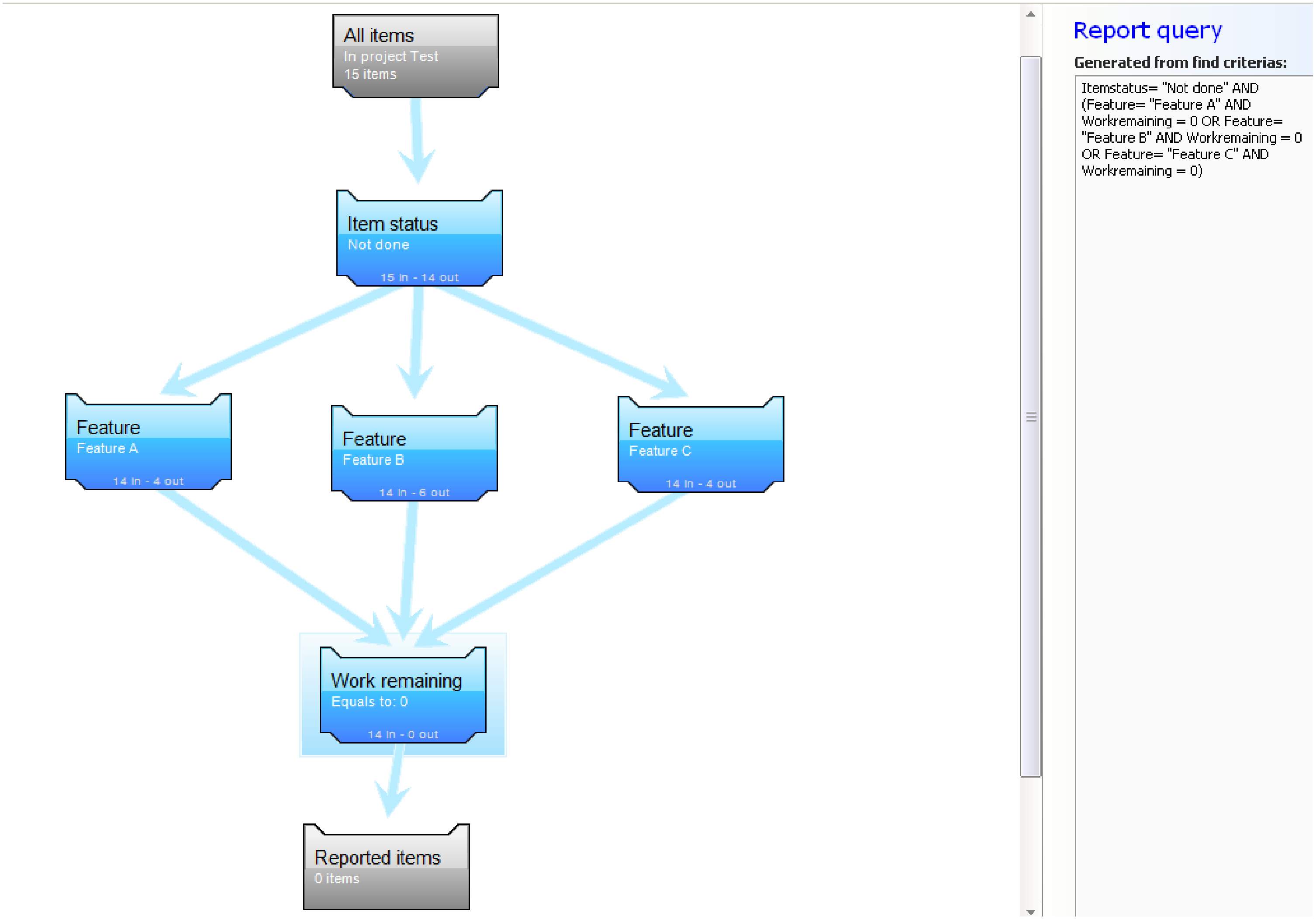


Branching out to more than one connection means logically OR (see query language for more references).





AND and branching out to OR can be combined. The visual query below would result in Itemstatus= "Not done" AND (Feature= "Feature A" AND Workremaining = 0 OR Feature= "Feature B" AND Workremaining = 0 OR Feature= "Feature C" AND Workremaining = 0).



Grouping, sorting and selecting columns

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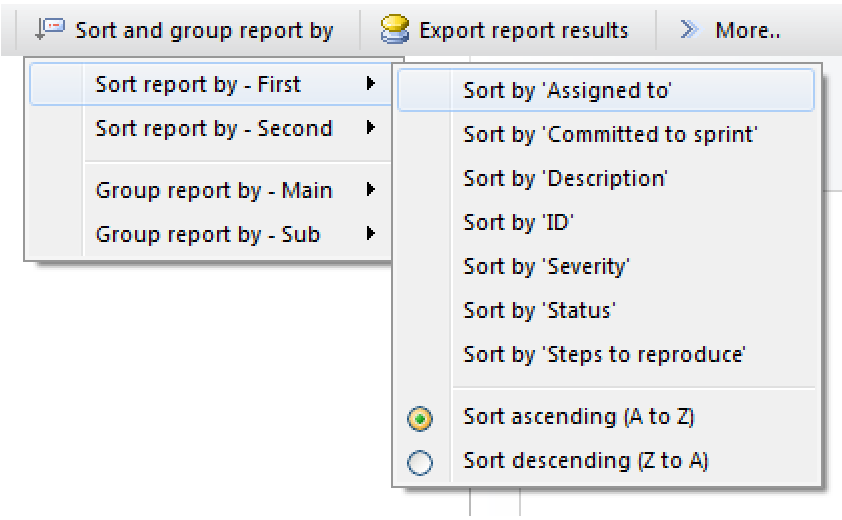
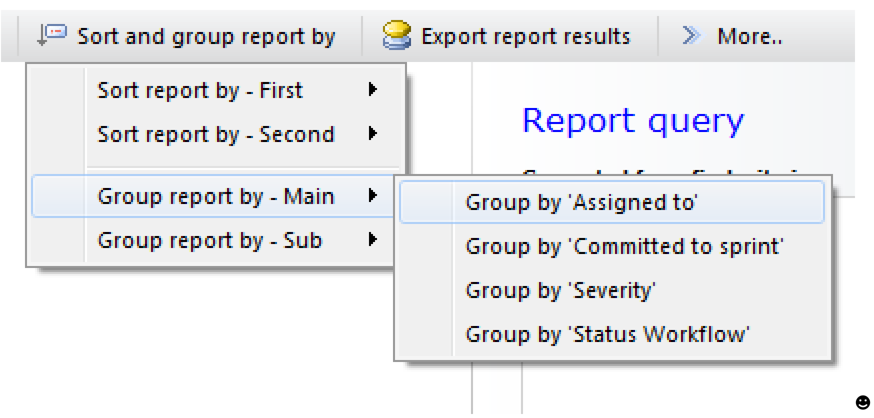
After a query has been created it is time to sort and group the result. This is very important in making the mined data set from the query more understandable.

A report result can be sorted by first one and the and a second column, ascending or descending.



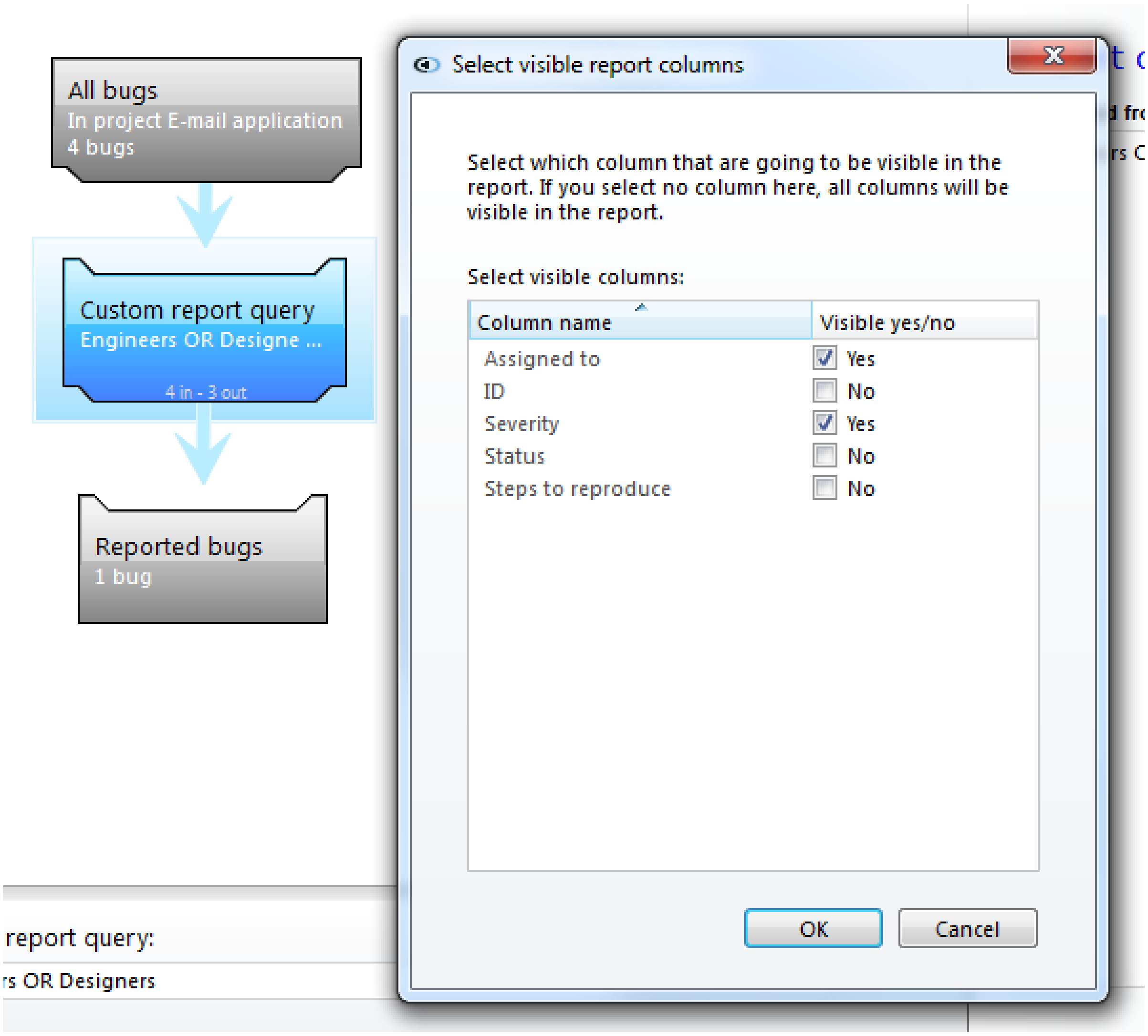
Grouping a report is done first with a main and then a sub group. The following column types are applicable for grouping: *Text*, *Multi-line text*, *Drop-list single choice*, *Drop-list multiple choice*, and *People.*



This is an example of items being first grouped per feature and then per sub feature, then sorted ascending in from the work remaining column.

	Item name	Work remaining	Feature	Sub feature	Item status
	Feature A				
	Sub feature A:				
	Task 1	5h	Feature A	Sub feature A	Not done
	1 item	5h			
	Sub feature B:				
	Task 5	2h	Feature A	Sub feature B	Not done
	Task 12	5h	Feature A	Sub feature B	Not done
	Task 8	6h	Feature A	Sub feature B	Not done
	3 items	13h			
	4 items	18h			
	Feature B				
	Sub feature A:				
	Task 3	5h	Feature B	Sub feature A	Not done
	Task 6	6h	Feature B	Sub feature A	Not done
	Task 9	24h	Feature B	Sub feature A	Not done
	3 items	35h			
	Sub feature B:				
	Task 10	5h	Feature B	Sub feature B	Not done
	1 item	5h			
	Sub feature C:				
	Task 13	1h	Feature B	Sub feature C	Not done
	Task 2	2h	Feature B	Sub feature C	Not done
	2 items	3h			
	6 items	43h			

You can also select which columns that are going to be visible in the project view:



Using find while report is active

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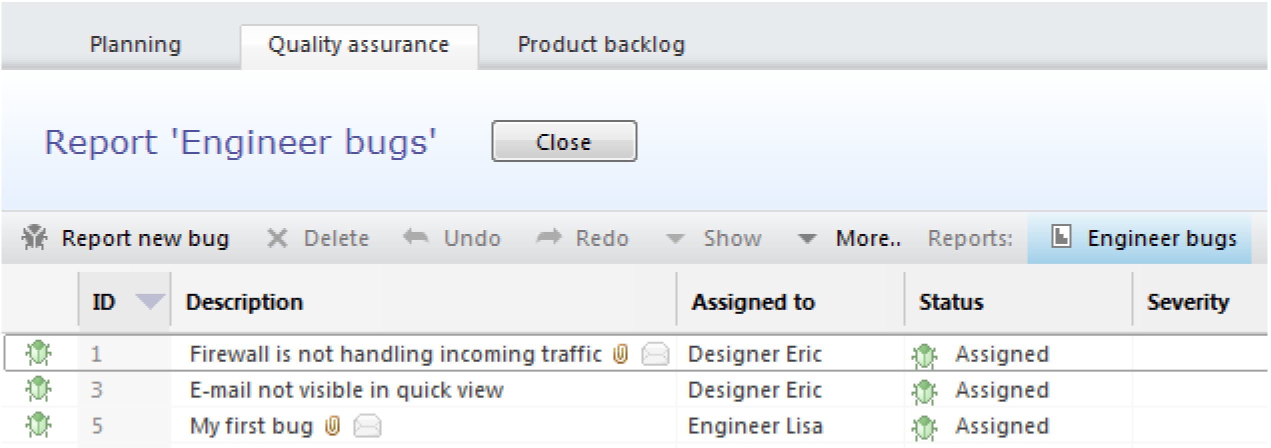
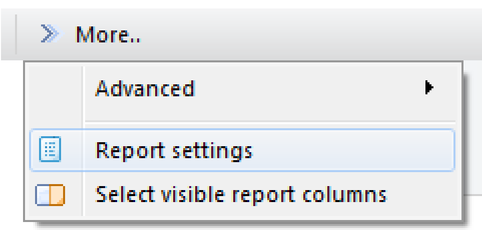
By default, Hansoft suppresses using the Find function while a report is active, as this can give empty or confusing results.



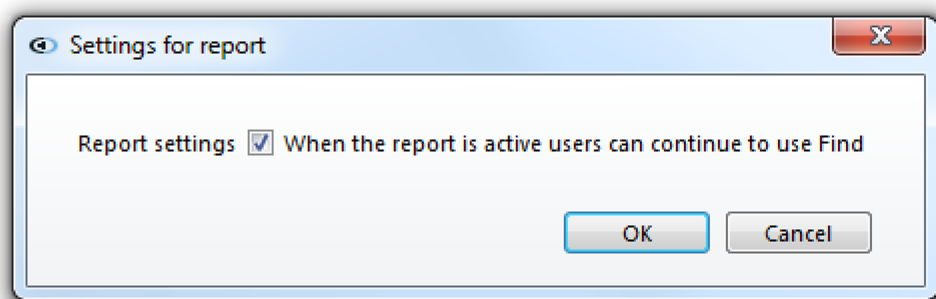
The Find button or textbox is not available with a report active

Individual reports can, however, be flagged to allow the Find function to be used. In the Report editor, click More, and Report settings.



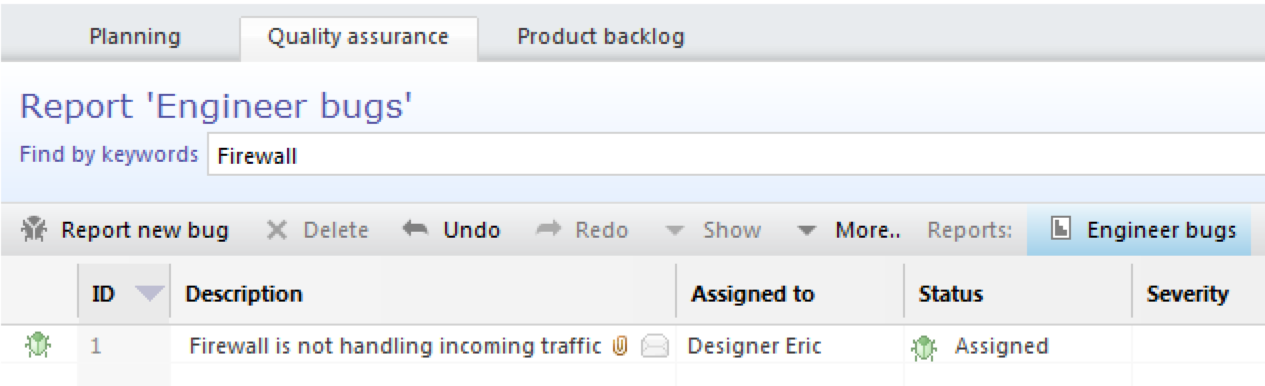
Entering the Report settings

Enable the option to allow Find when the report is active.



Enabling the Find function for a report

When the report is active you can now use Find.



Exporting report results

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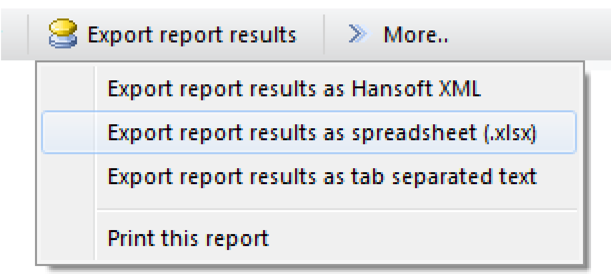
When the report is finished you may want to export it to a file or print it.

The report can be exported as Hansoft XML, spreadsheet or as tab-separated text.



This is how a raw report, grouped and sub grouped in Hansoft, can look like when exporting to spreadsheet and load it into Microsoft Excel®:

A	B	C	D	E	F	G	H	I	J	K
Item name	Work remaining	Feature	Sub feature	Item status	Hyperlink	Release tag	Work priority	Resources		
Feature A										
Sub feature A										
Task 1	5	Feature A	Sub feature A	Not done			1			
1 item	5h									
Sub feature B										
Task 5	2	Feature A	Sub feature B	Not done			5			
Task 12	5	Feature A	Sub feature B	Not done			10			
Task 8	6	Feature A	Sub feature B	Not done			14			
3 items	13h									
4 items	18h									
Feature B										
Sub feature A										
Task 3	5	Feature B	Sub feature A	Not done			3			
Task 6	6	Feature B	Sub feature A	Not done			6			
Task 9	24	Feature B	Sub feature A	Not done			13			
3 items	35h									
Sub feature B										
Task 10	5	Feature B	Sub feature B	Not done			12			
1 item	5h									
Sub feature C										
Task 13	1	Feature B	Sub feature C	Not done			9			
Task 2	2	Feature B	Sub feature C	Not done			2			
2 items	3h									
6 items	43h									

This is how the same report can look like when it is printed:

Page 1/3

	Item name	Work remaining	Feature	Sub feature
	Feature A			
	Sub feature A:			
1	☐ Task 1	5h	Feature A	Sub feature A
	1 item	5h		
	Sub feature B:			
2	☐ Task 5	2h	Feature A	Sub feature B
3	☐ Task 12	5h	Feature A	Sub feature B
4	☐ Task 8	6h	Feature A	Sub feature B
	3 items	13h		
	4 items	18h		
	Feature B			
	Sub feature A:			
5	☐ Task 3	5h	Feature B	Sub feature A
6	☐ Task 6	6h	Feature B	Sub feature A
7	☐ Task 9	24h	Feature B	Sub feature A
	3 items	35h		
	Sub feature B:			
8	☐ Task 10	5h	Feature B	Sub feature B
	1 item	5h		
	Sub feature C:			
9	☐ Task 13	1h	Feature B	Sub feature C
10	☐ Task 2	2h	Feature B	Sub feature C
	2 items	3h		
	6 items	43h		

Portfolio allocations

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Examining the allocation of users is important in a number of crucial ways:

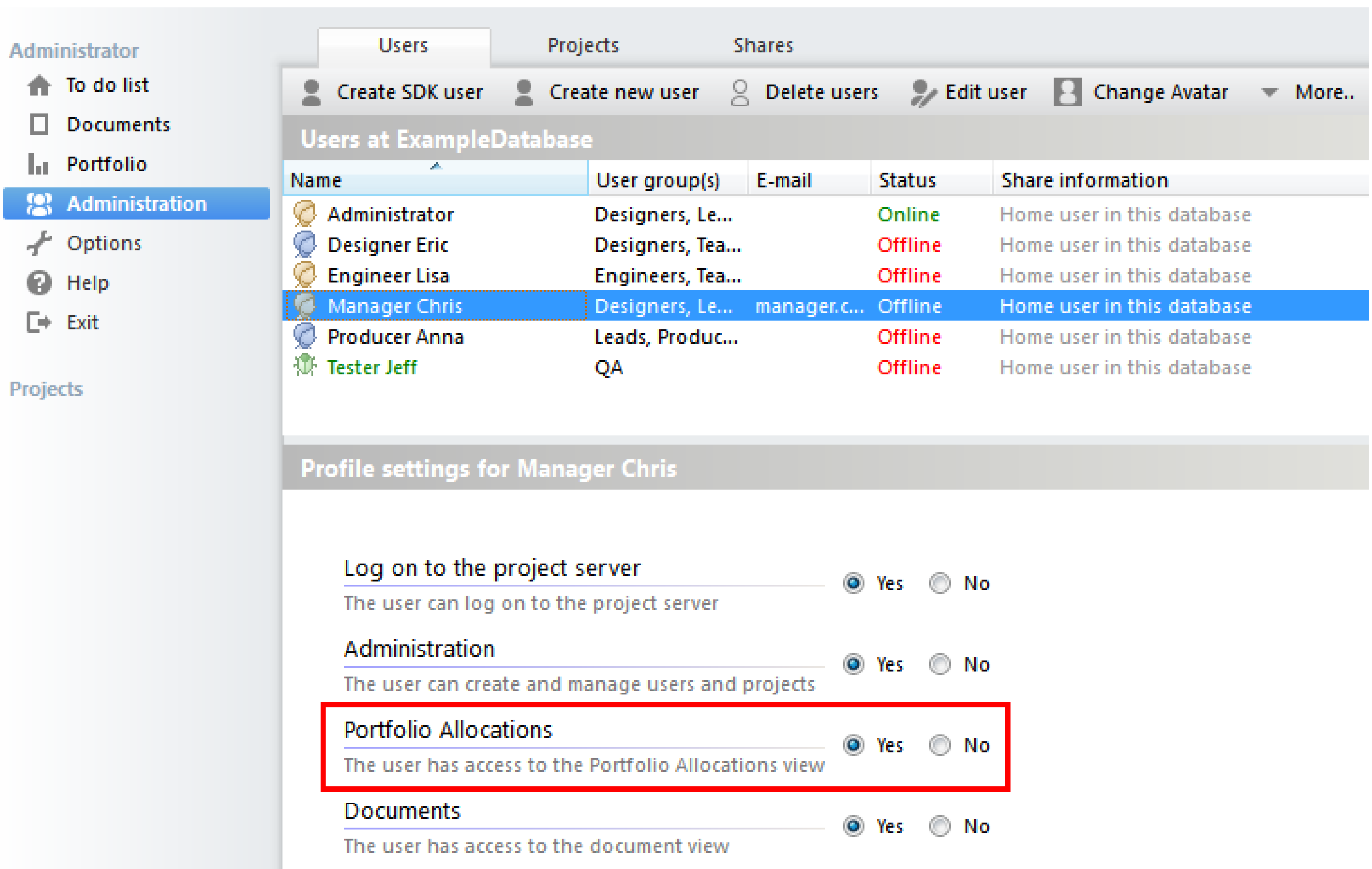
- It is preferable to have a smooth 100% allocation of the user over time, avoiding over- and under allocation.

- You want to see where and between which projects there is a conflict if over-allocation occurs.
- You want to get a clear overview of the Portfolio allocations for the whole company or groups within the company.

All things listed above are visualized in the Portfolio Allocations view.

Enabling access to Portfolio allocations

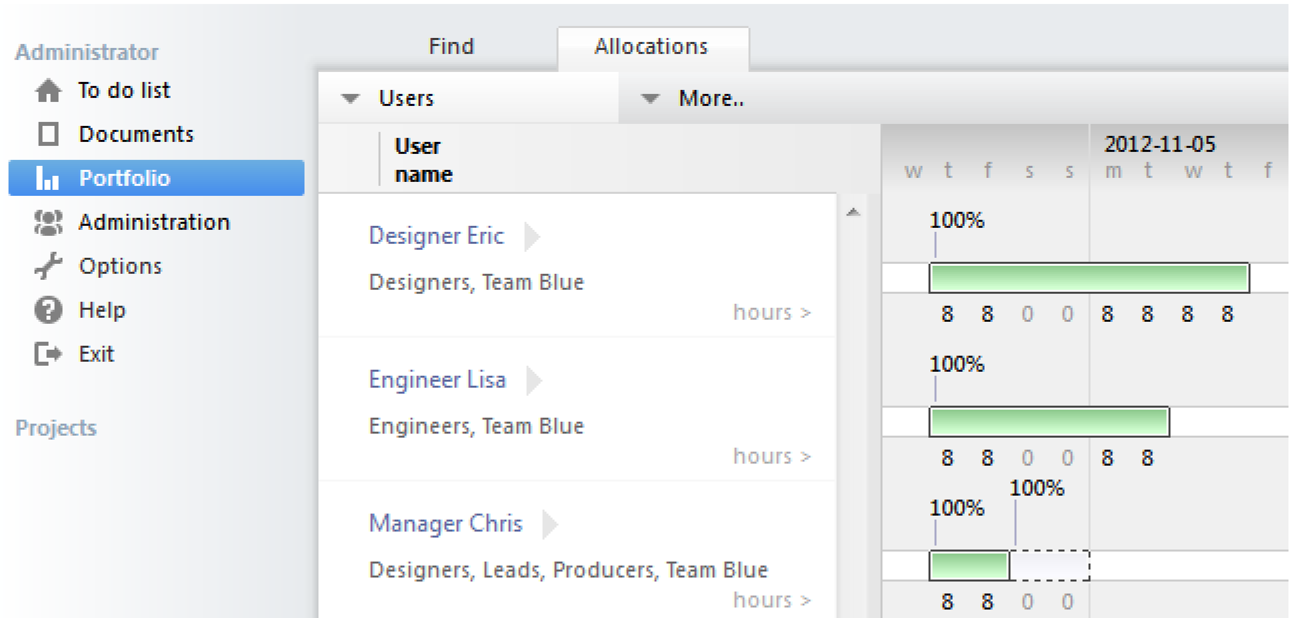
The Portfolio allocations view is enabled in the profile settings for user under the Users tab in administration.



Enabling portfolio allocations for a user

The portfolio allocations view

All users that have access to Portfolio allocations will see the Portfolio section in the left-hand navigation pane.



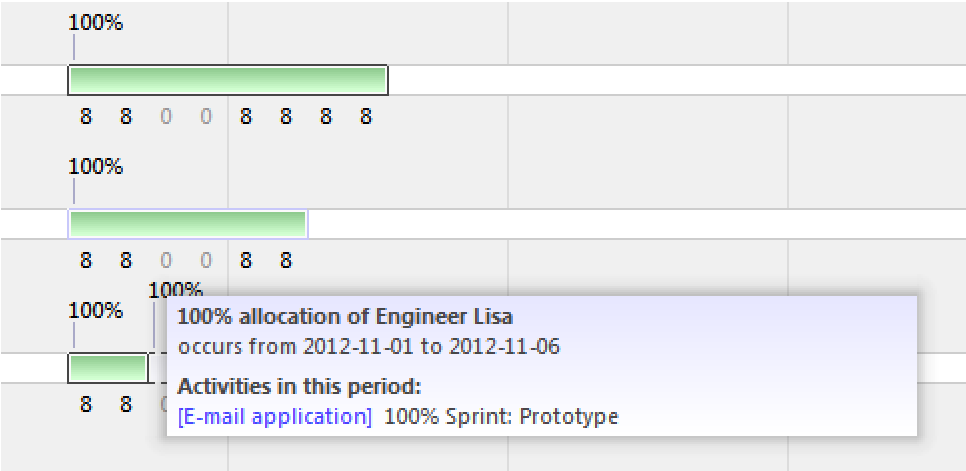
The portfolio allocations view

All the company users are listed in this view, and all changes that occur in the projects will affect this view in real-time. An average allocation for all users is shown and updated in real-time. This can come especially in handy when one is looking for periods of under- and overallocation for the entire company over time.

For every user, you have a white horizontal bar and zones in different colours that indicate Portfolio allocations from 0% and upwards. In the most zoomed in mode in the timeline view and under the Portfolio allocations zones, you have the hours that the user is allocated to day by day. If you move the mouse over a Portfolio allocations zone a tool tip will pop up displaying important details.

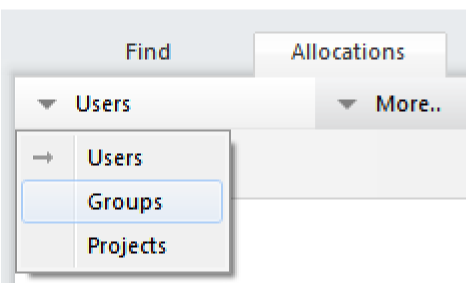
Go to tasks from Portfolio allocations

You can right click on a user allocation zone and go directly to tasks in that zone from any Portfolio allocations view. If you are going to do user leveling, this is a very handy tool. Use F8 to go back to Portfolio allocations after you have corrected the tasks.



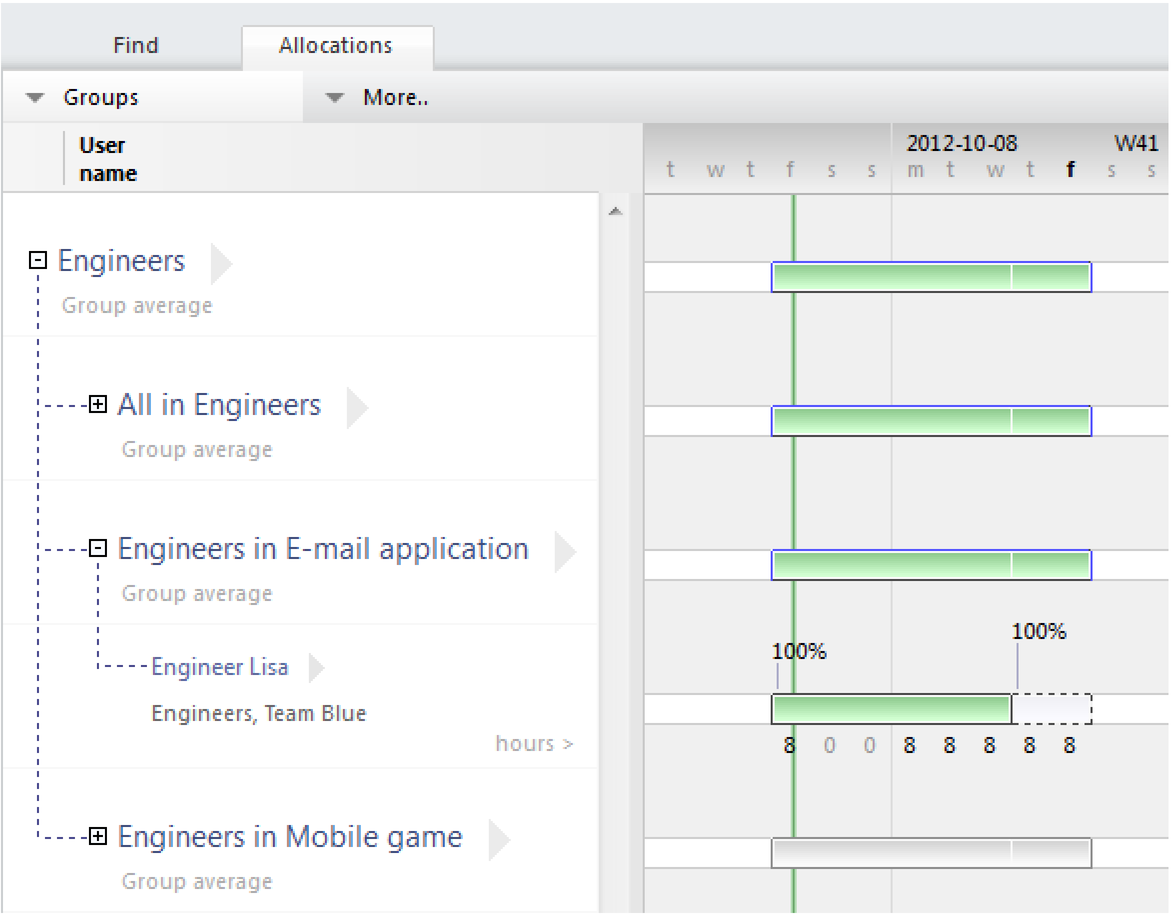
User groups

When administrating a user, you can assign a group to a user, like "Programmers" or "System designers". These groups come to use in the Portfolio allocations view when selecting "Show all user groups" on the top blue bar. One can now see the the average allocation for all groups and see all individuals in the group. Also, you can see user groups divided by project.



The portfolio view selector

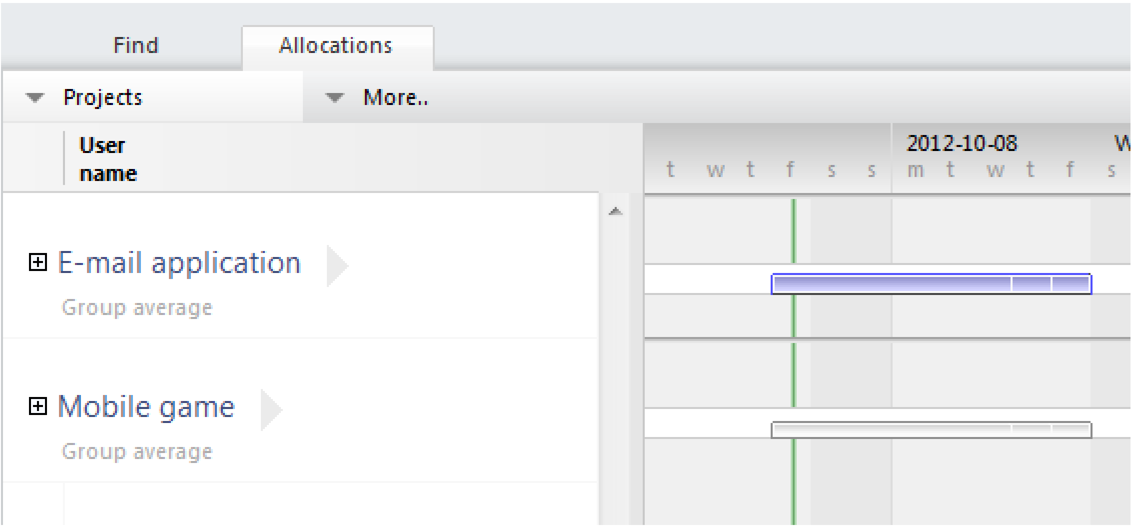
Please note: the grey zones in this example signify that the user group "Programmers" are allocated in general but do not have any work related to the project



Users in projects

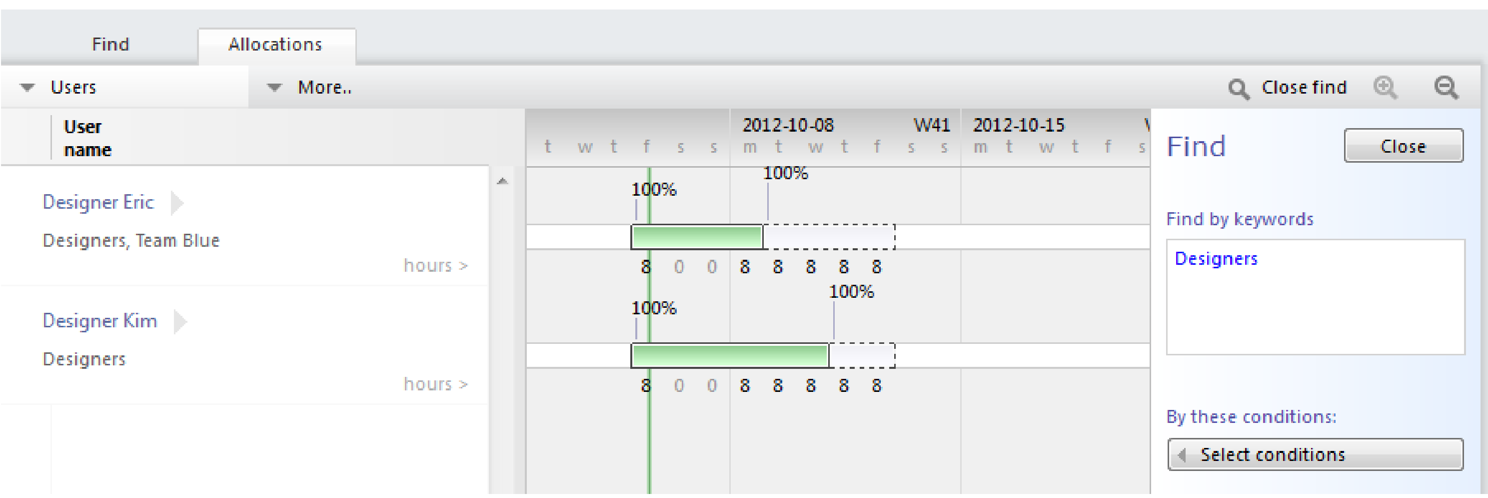
In a similar way to the user groups, Hansoft can divide users into projects, showing the average allocation for these projects. Select "Show all projects " on the top blue bar. You can now see all individuals in the group and the average allocation for all user groups within the project.

Please note: again, the grey zones in this example signify that the user group "Programmers" are allocated in general but do not have any work related to the project.



Finding users, groups or projects

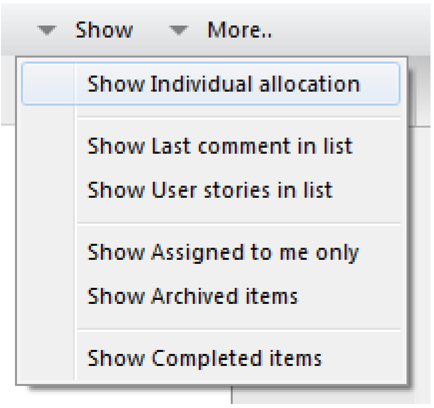
When pressing the "Find" button on the toolbar it opens the Find window. This function is very useful to cut out exactly that data that you are looking for and it works in the same way that a common search engine works (like Google.com). Write the keywords that you are looking for and combine them with a condition below and instantly find the information.



Showing individual allocations in the project plan

One effective way of getting a smooth user allocation or to solve allocation conflicts between projects is to insert

the user allocation directly into the project plan, letting it update when you update the plan. This is often essential when performing user leveling. A recommendation for user leveling, except while inserting Portfolio allocations, is to use the arrange functionality.



Documents

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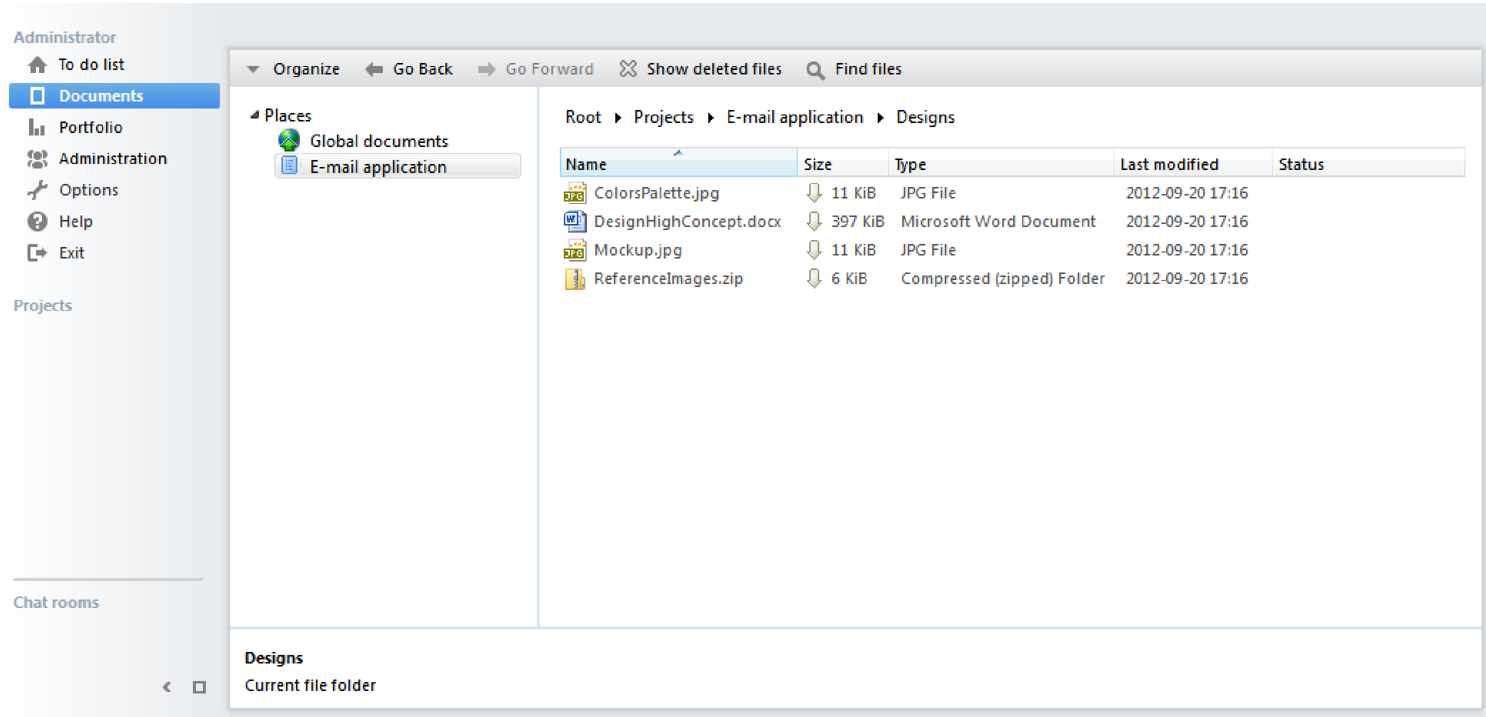
Hansoft has the ability to store documents on the central project server.

Documents can be uploaded and downloaded from Hansoft Project Manager and can, therefore, be managed independently of their physical location. Hansoft also incorporates full version control, and the documents can be rolled back to earlier versions (click Show file history in the Documents view).

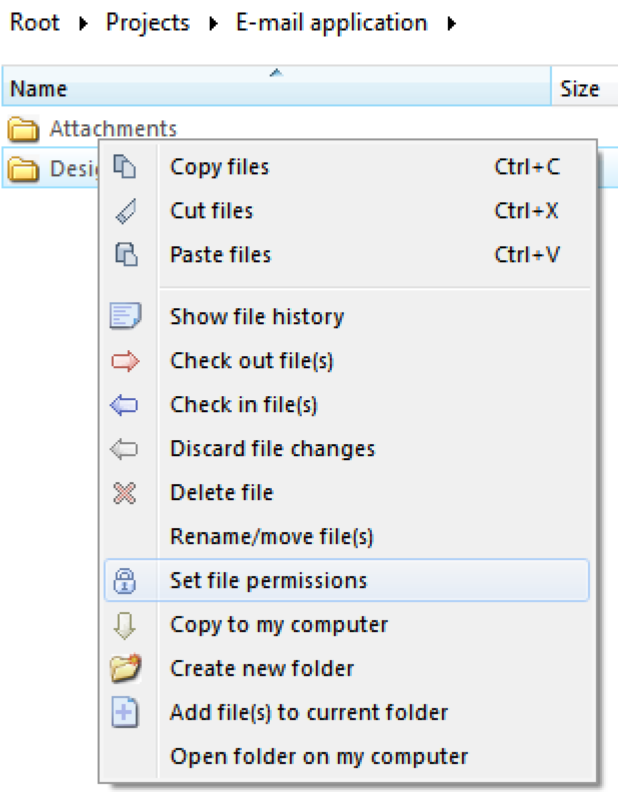
The Documents view

The Documents view emulates the standard behaviour of a file browser. Users may read, edit, check in and check out documents. When checking out a document, you become the owner of that document, and only you can make changes to it. Once the document has been checked in, the document again becomes available for everybody else and will be stored as the latest version.



A typical documents folder

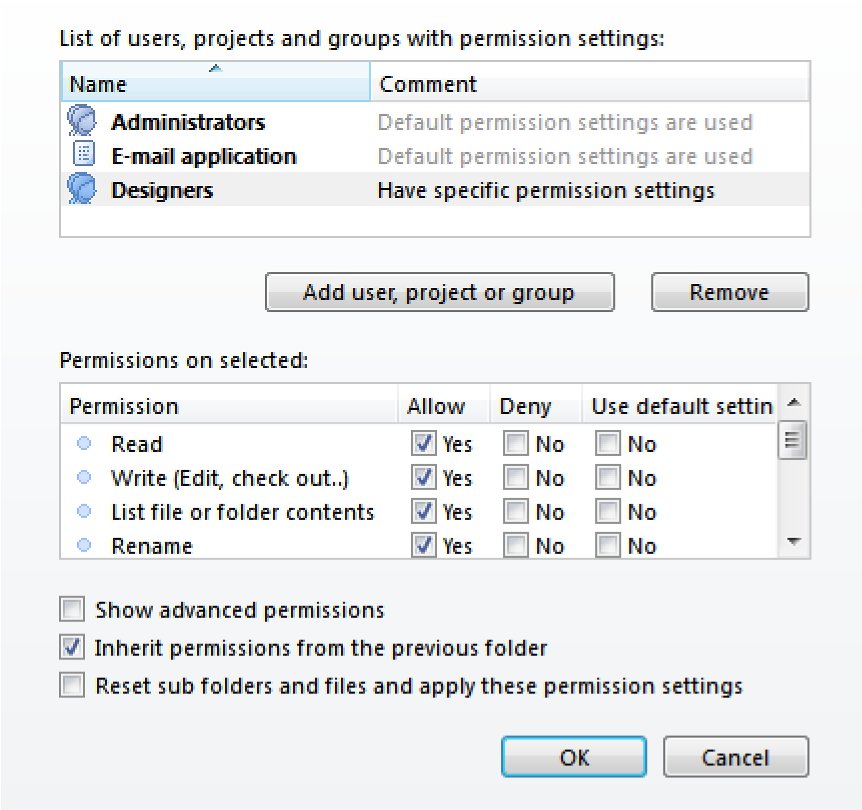
Permissions for reading and editing documents



Accessing the file permissions dialog

The Administrator account on the server database always has full access to all documents and folders, as do users with administrator rights, unless this has been explicitly changed by another administrator in the user settings. Users without administrator rights have access to the projects they are connected to, as well as the Global Documents folder. This too can be changed by administrators.

In addition, detailed permissions can be set on all files and folders for everyone except for the Administrator account who has the right to reset all other set permissions



The file permissions dialog

More details on File and Folder tasks

Edit file

Editing a file automatically performs a complementary Check Out operation. The file is then opened in the associated editor (typically a word processor). Other users are now prevented from editing the document as long as you have it checked out. Click on Check in to check in the file once your changes are made.

Read file

Opens the document in the associated editor without checking it out. You can, therefore, make no changes to it.

Show file history

Every time a document is checked in, for example, a new version is stored in the file/document history. A document can be rolled back to an earlier version.

Check out

Checks out the document. Other persons are now prevented from editing the document as long as you have it checked out; click on Check in to check in the document.

Check in

Checks in the document and the new version becomes available to everyone else.

Discard changes

The file will no longer be checked out and the current version of the document will be discarded.

Delete

Documents and folders can be either temporarily or permanently deleted. A temporarily deleted document may be shown by clicking on the Show deleted files button on the main Documents toolbar.

Restore deleted

If a document is temporarily deleted, and shown by clicking the Show deleted files button, it can be restored to its original state.

Set permissions

A document or a folder can have very detailed permissions. Please read "Permissions for reading and editing documents" above.

Copy to my computer

The document or folder will be copied or updated from the central project server.

Create new folder

Creates a new folder within the current folder.

Add to current folder

You can add documents from your computer and store them on the central project server.

Using the chat

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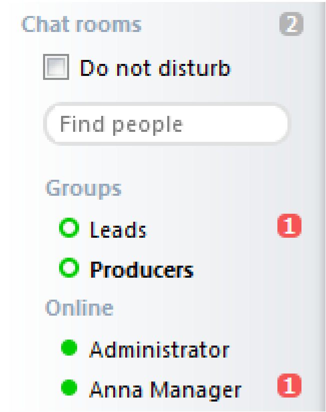
Chat rooms

There are two types of chat rooms: Individual User-to-user chats, and Group chats, that are based upon the User Groups

Unread counts



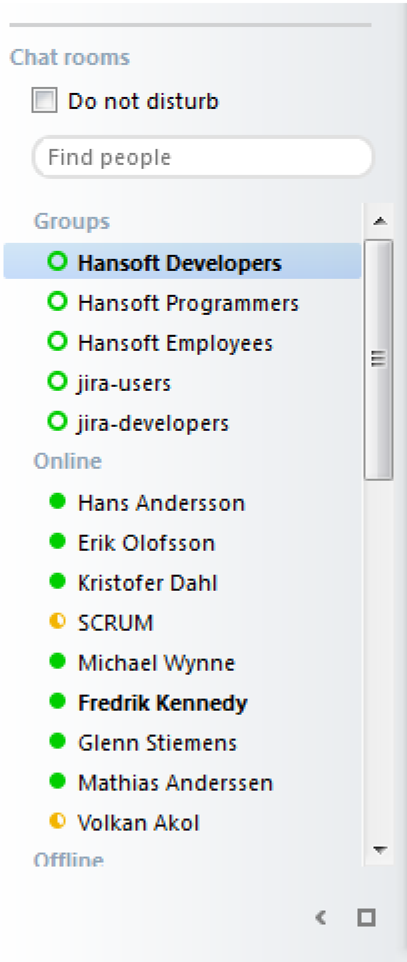
The chat room list showing unread messages

Incoming messages will increase the Unread messages counter of the chat room in which the message arrived. The Chat

Starting a chat

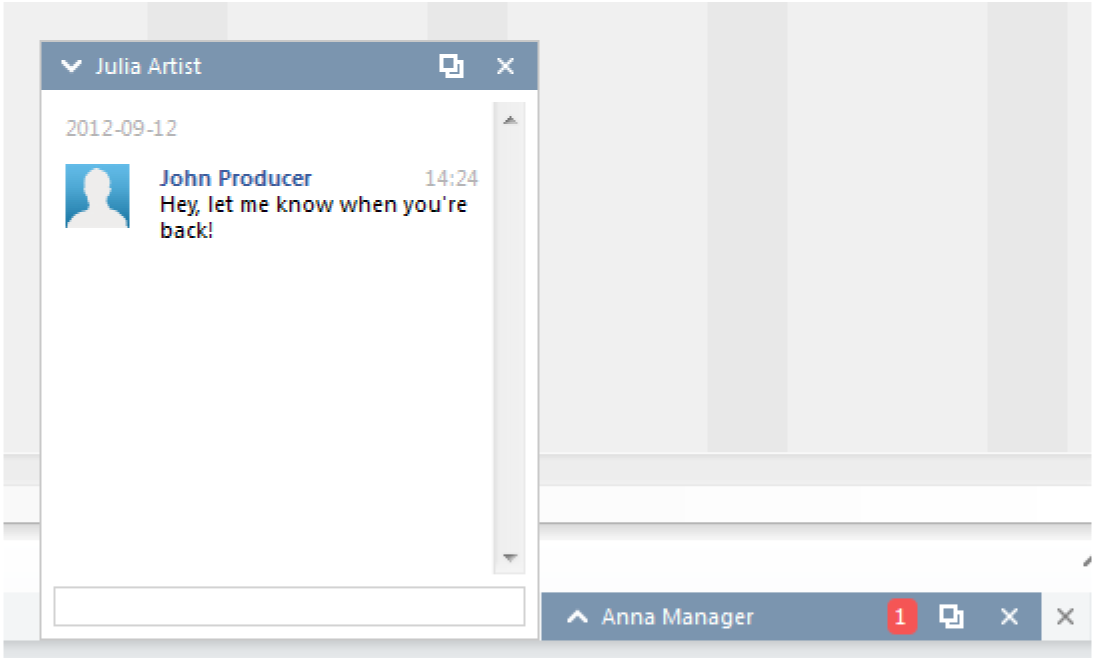
To start a chat conversation, double-click on the name of the group or user in the Chat rooms section. The name will be

Chats can also be started by clicking a Name link in any other area of Hansoft.



The chat roomslist

Open and minimized chat rooms



An open and a minimized chat room

Chat rooms can be open or minimized. Minimized chat rooms will have the Unread counter visible whenever there are u

Click the Minimize icon of an open chat window to minimize it. Click the **Open icon** to open it.

Presence indicators

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In the Chat rooms list, the users and groups have icons indicating their current presence. The presence is determined by user activity (moving the mouse), whether the user is connected to Hansoft, and whether the user has enabled Do not disturb.

User presence icons

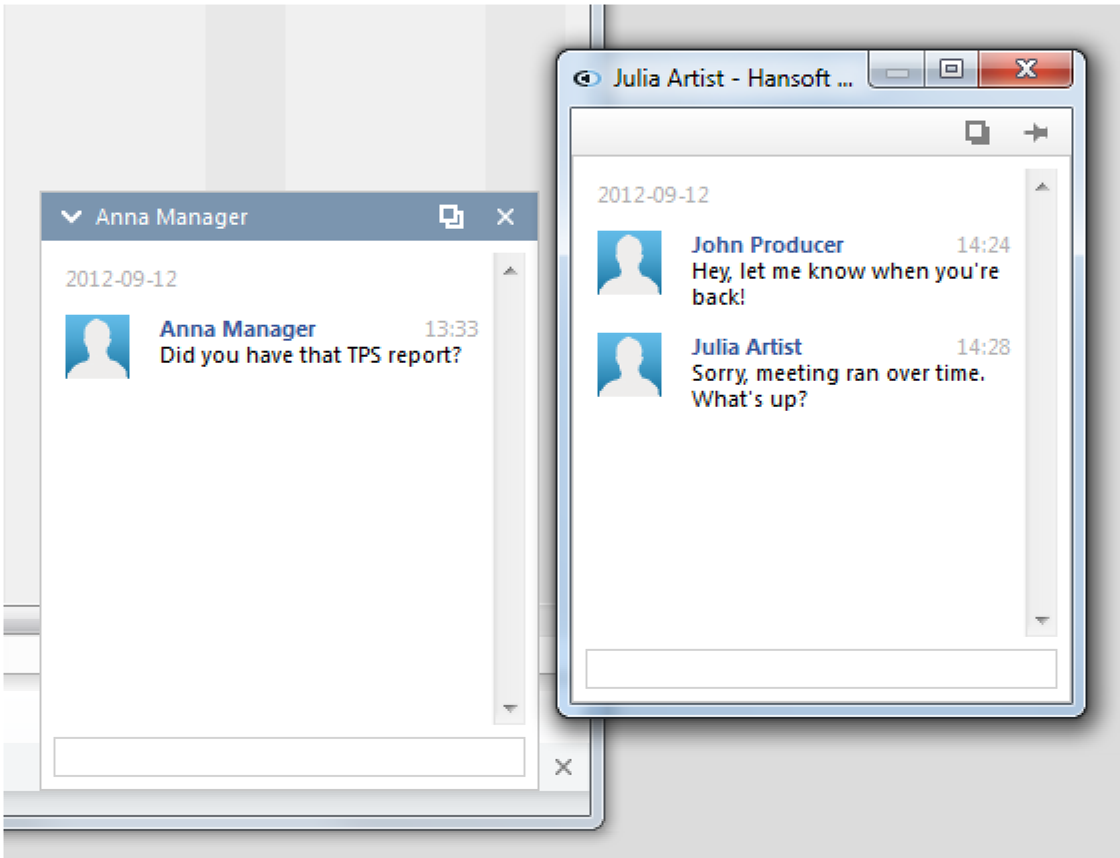
- User is connected to Hansoft, and is active
- User is connected, but has not moved the mouse in the last 5 minutes
- User connected, but has enabled Do not disturb
- User is currently not connected to Hansoft

Group presence icons

- At least one member of the group is connected
- No other members of the group are connected

Docking and pinning chat rooms

Docking and undocking



Docked and undocked chat windows

Chat windows can be either docked within the Hansoft main window, or appear as undocked (free-floating) windows. Thi

Pinning and unpinning

Undocked chat windows can be pinned to always appear on top of other windows. Click the Pin icon  to bring a window

Hansoft integrations

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Hansoft Perforce integration

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The Hansoft Perforce integration allows you to integrate Hansoft tasks/items/bugs with Perforce jobs.

Features

Generate Perforce job spec automatically from Hansoft column configuration.

Integrate multiple Hansoft servers/databases with one Perforce server.

Integrate different Perforce servers into various projects in one database.

Separate Perforce integration settings for different projects and the backlog and QA tabs.

Choose which columns should be replicated in Perforce.

Choose which columns should be replicated as read only in Perforce.

Access Perforce fix history from Hansoft with links bringing you to information on the P4Web server.

Change status of an item from within Perforce and force workflow rules with help of Perforce triggers.

Use Hansoft reports to select which Hansoft items should be replicated in Perforce.

Bind Hansoft users to Perforce users to enable submit checks.

Send admin email notifications about errors encountered.

Prerequisites

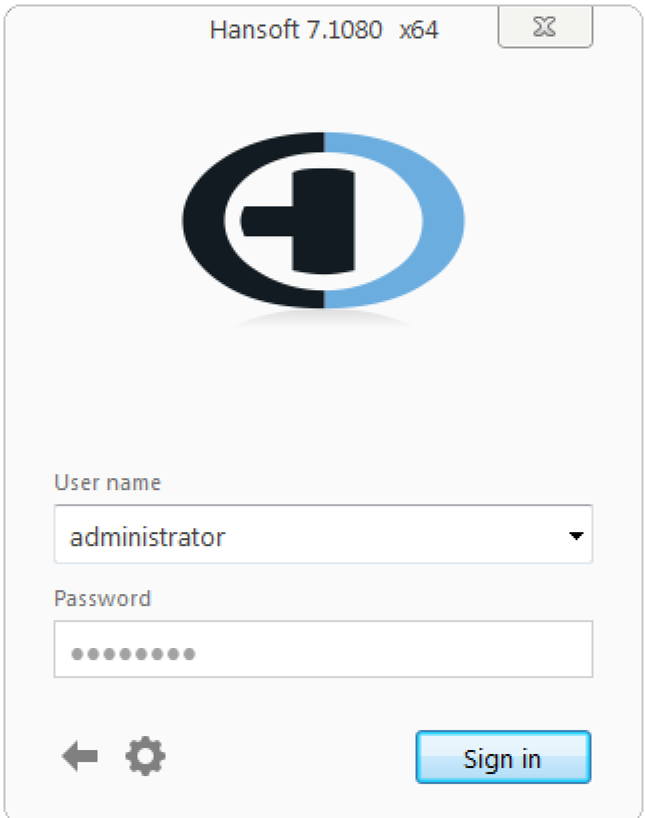
Before running the Perforce integration against your live server you should test it against a sandboxed Hansoft server.

It is also preferable that you use a sandboxed Perforce server that you can test against. A trial Perforce server with two resources is adequate.

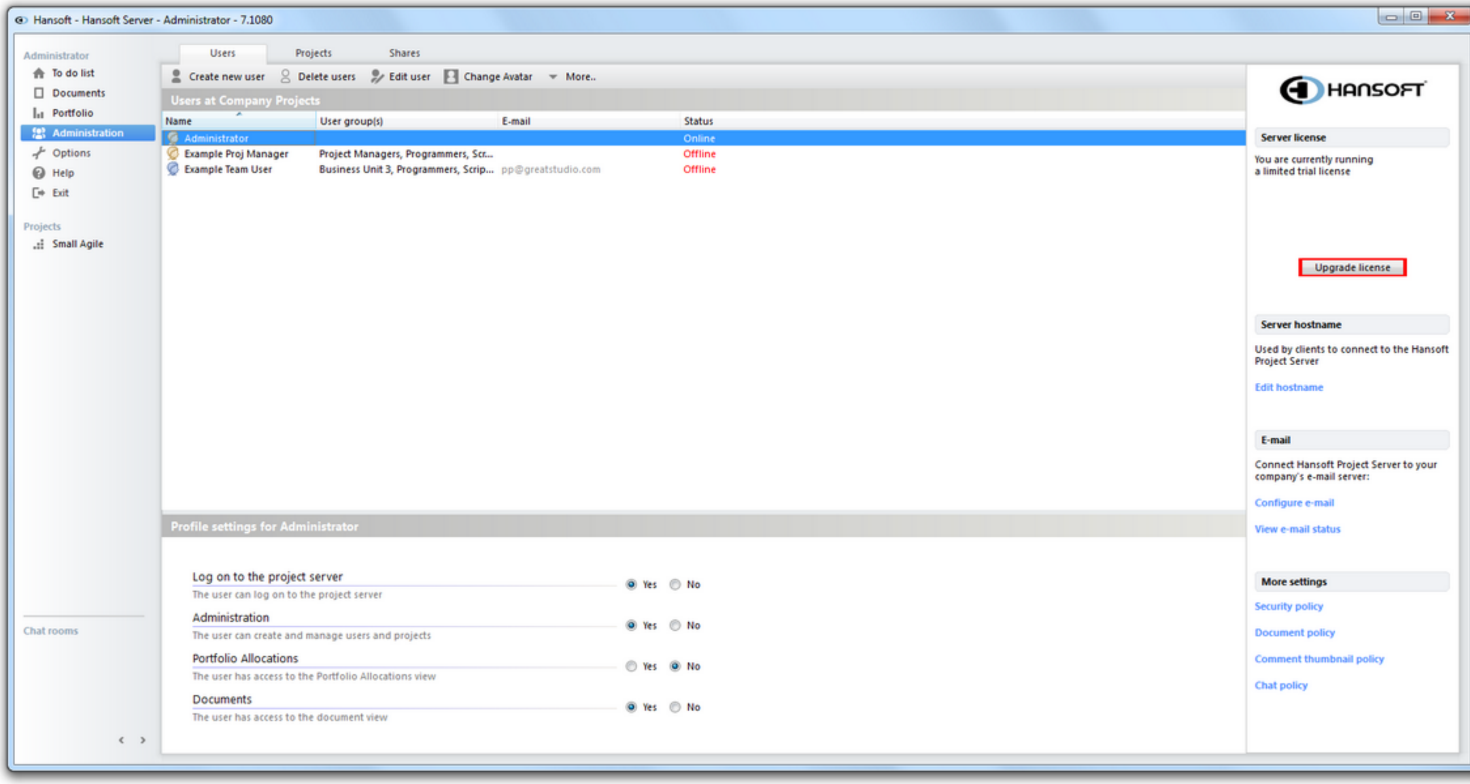
To run the integration you need to have a Hansoft license with the SDK module enabled. To enable the SDK module on your live license or request a SDK sandbox license, contact support@hansoft.com.

Installation

After you have installed your Hansoft sandbox server, log in with the default Hansoft Administrator account, "Administrator". This is the only account permitted to create SDK accounts.

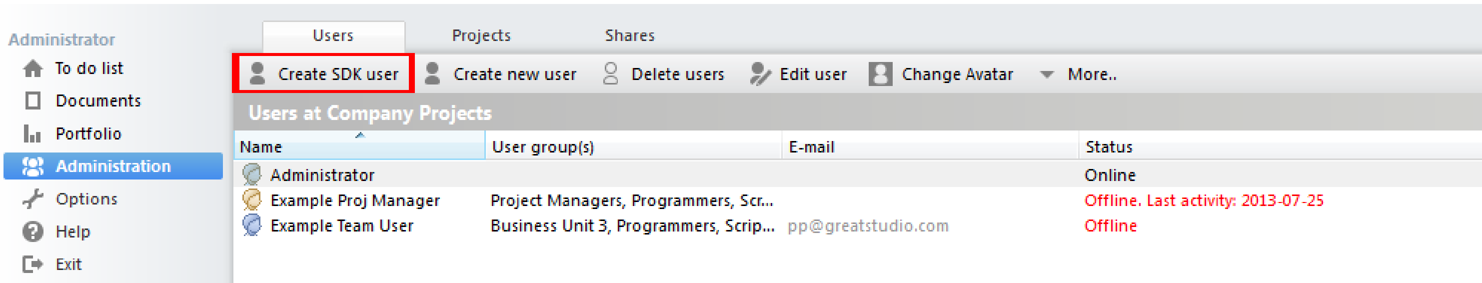


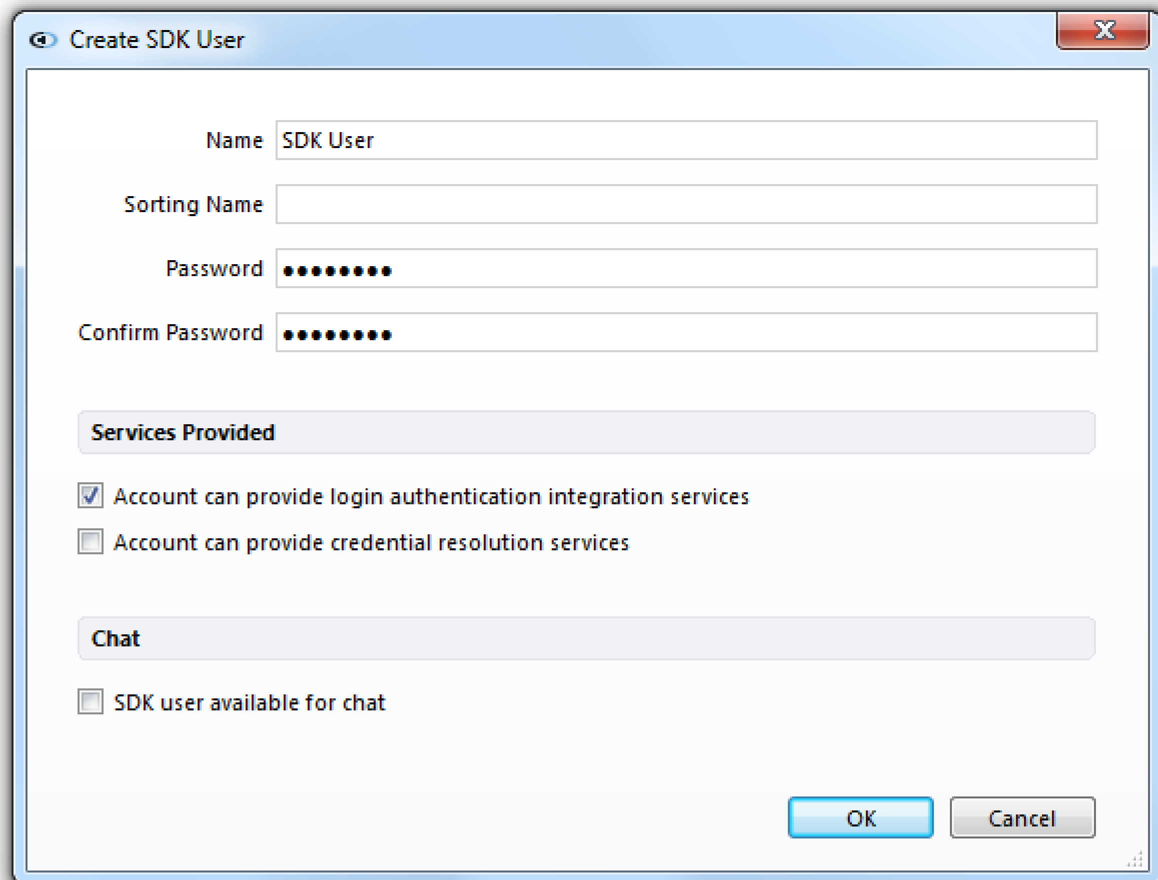
When you have logged in, upgrade your license to one with the Hansoft SDK module enabled, if you have not done so already. The license upgrade is delivered via e-mail if the server is not connected to the Hansoft license server. If you are connected to the Hansoft license server the SDK module will be automatically enabled when support@hansoft.com has been contacted and confirmed its activation.


Hansoft - Hansoft Server - Administrator - 7.1080
Administrator
To do list
Documents
Portfolio
Administration
Options
Help
Exit
Projects
Small Agile
Chat rooms
Users
Projects
Shares
Create new user
Delete users
Edit user
Change Avatar
More..
Users at Company Projects
Name
User group(s)
E-mail
Status
Administrator
Online
Example Proj Manager
Project Managers, Programmers, Scr...
Offline
Example Team User
Business Unit 3, Programmers, Scrip...
pp@greatstudio.com
Offline
Profile settings for Administrator
Log on to the project server
The user can log on to the project server
Administration
The user can create and manage users and projects
Portfolio Allocations
The user has access to the Portfolio Allocations view
Documents
The user has access to the document view
Yes
No
HANSOFT
Server license
You are currently running a limited trial license
Upgrade license
Server hostname
Used by clients to connect to the Hansoft Project Server
Edit hostname
E-mail
Connect Hansoft Project Server to your company's e-mail server:
Configure e-mail
View e-mail status
More settings
Security policy
Document policy
Comment thumbnail policy
Chat policy


Upgrade license
Support ...
Upgrade license
You can upgrade your license here. Please fill in the number of additional user accounts you want your license to cover.
I want to increase my license to cover this many new accounts:
10
Order upgrade
Enter license key manually
HANSOFT
Close

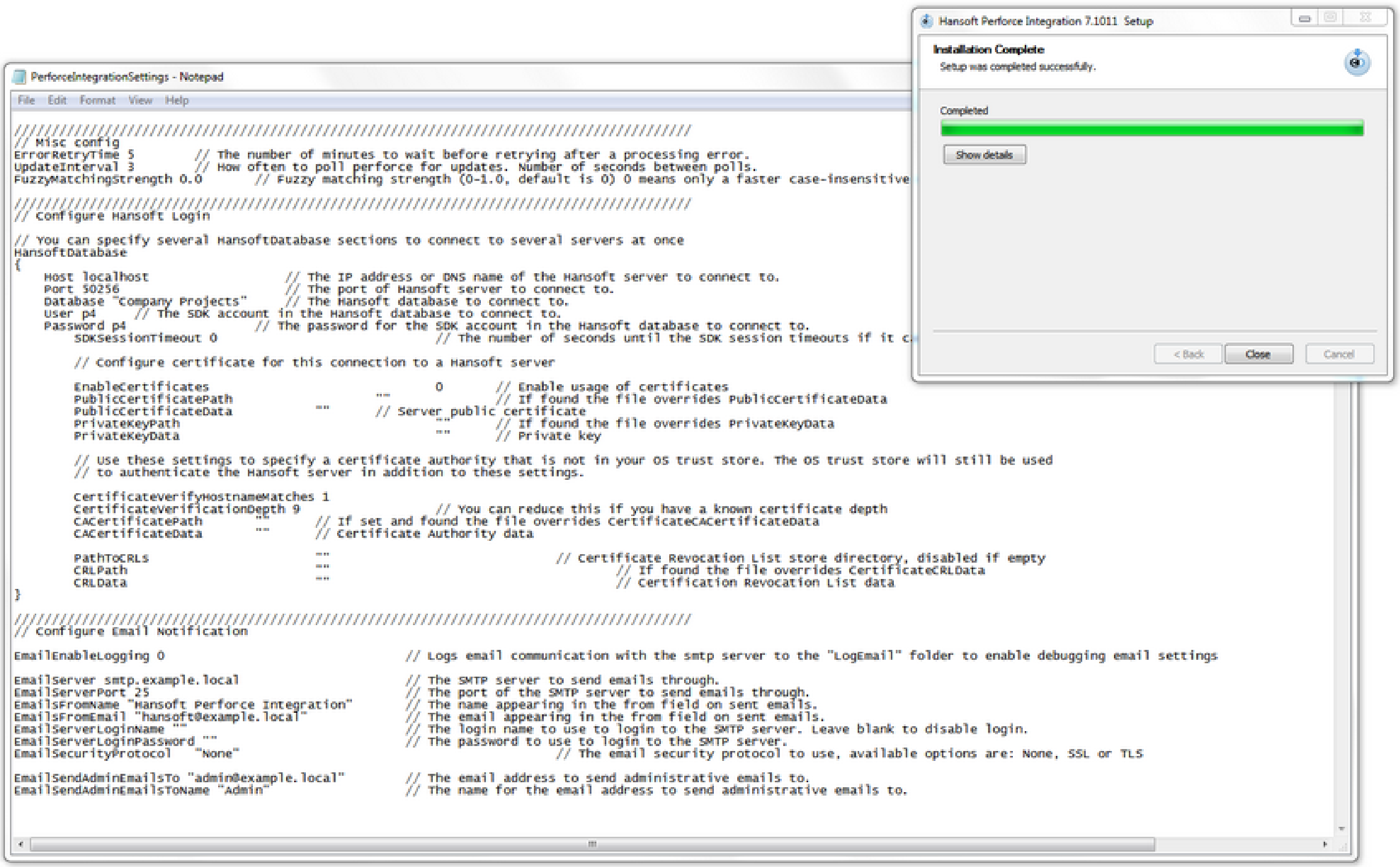
Once you have a license with the SDK module enabled and are logged in as the Administrator user, the "Create SDK user" button will become visible. Press this button to create the Hansoft SDK Account.





You are now ready to install the Perforce integration. The integration runs as a service that connects to one or several Hansoft servers and one or several Perforce servers. This means that you don't need to run the integration on the same server as the one that runs the Hansoft server or Perforce servers. As long as you are able to connect to both the Hansoft server and the Perforce server the integration service can run on any machine.

Run the HansoftPerforceIntegration_X_XXXX.exe installer to install the service. The installer will pop up a notepad that lets you edit the configuration file for the integration:



The comments in the configuration file document the various settings. The most important part to fill out correctly when the installer runs is the email configuration. All errors and notifications are sent to the administrator through email, so make sure that you have the email correctly configured before you edit the other options.

After you have changed the configuration to your liking, close the notepad application and the installer will finish and the service will be started.

Any errors are logged to file in both the Log folder of the installation directory as well as via email. If you need to change the configuration you can find the file "PerforceIntegrationSettings" under the installation folder ("c:\Program Files\Hansoft\Perforce Integration\PerforceIntegrationSettings").

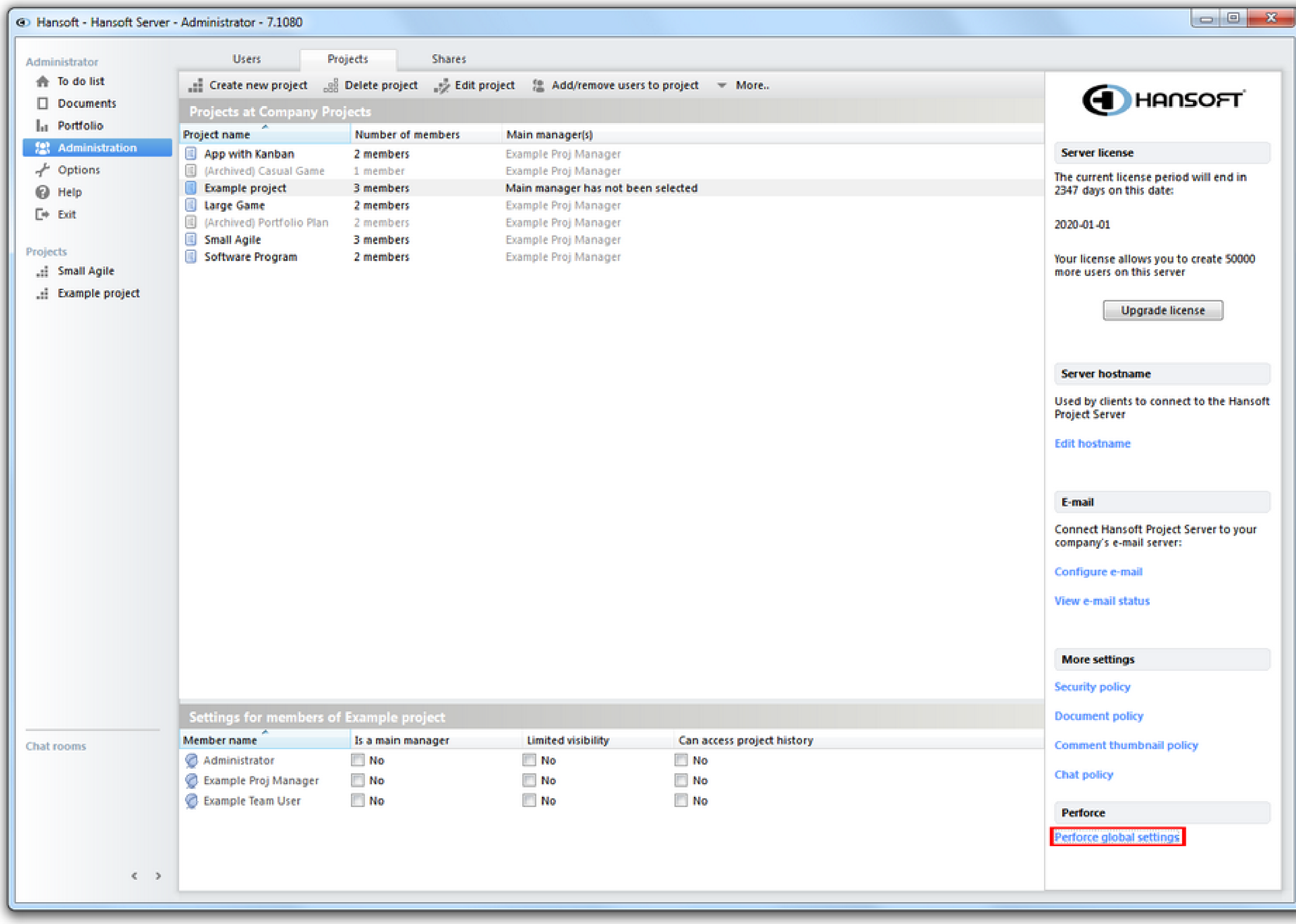
When you have changed any settings in the configuration file you need to restart the "Hansoft Perforce Integration Services" (HPMPerforceInt) service in order for the changes to take effect.

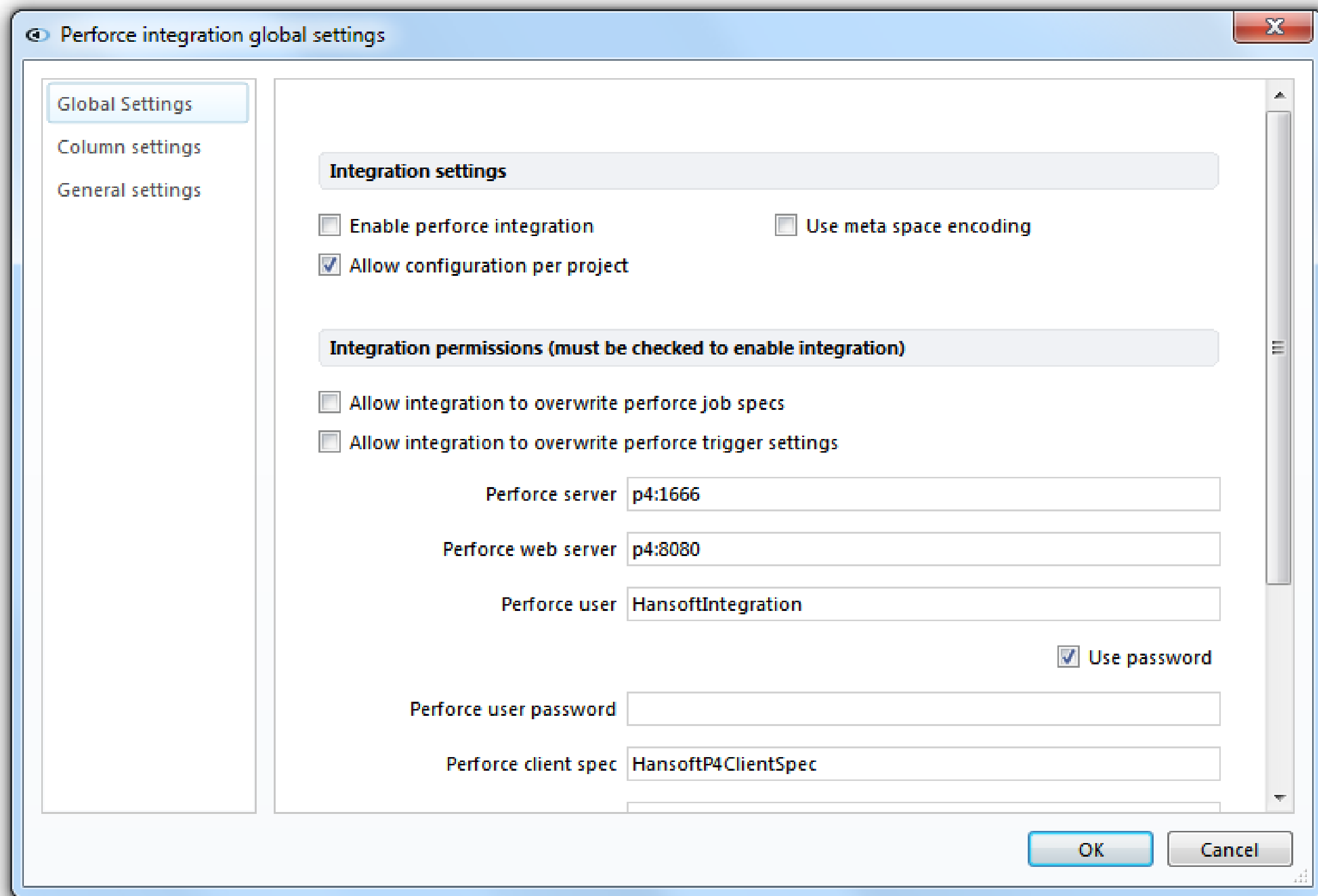
All Hansoft integrations against a Perforce server must be handled by the same Integration Service, even if it is a different Hansoft server that is going to be integrated. This is accomplished by specifying two HansoftDatabase sections in the configuration file.

Hansoft Configuration

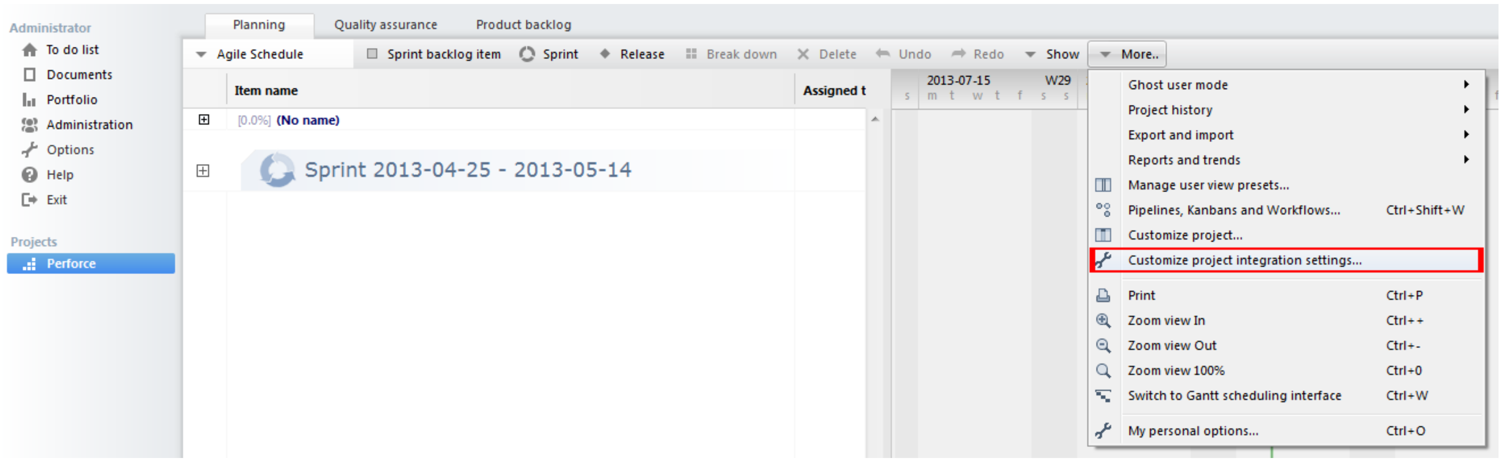
You can configure the integration on several levels. At the global level, all Projects, backlogs and QA sections in the database are affeicted. You can override and change specific settings for the various Projects, backlogs and QA sections. The recommended way is to configure the Perforce server settings globally, while leaving the Enable perforce integration check box unchecked and then enabling the integration on only the projects and views that you want to be accessible from Perforce.

Accessing the global Perforce Integration settings:

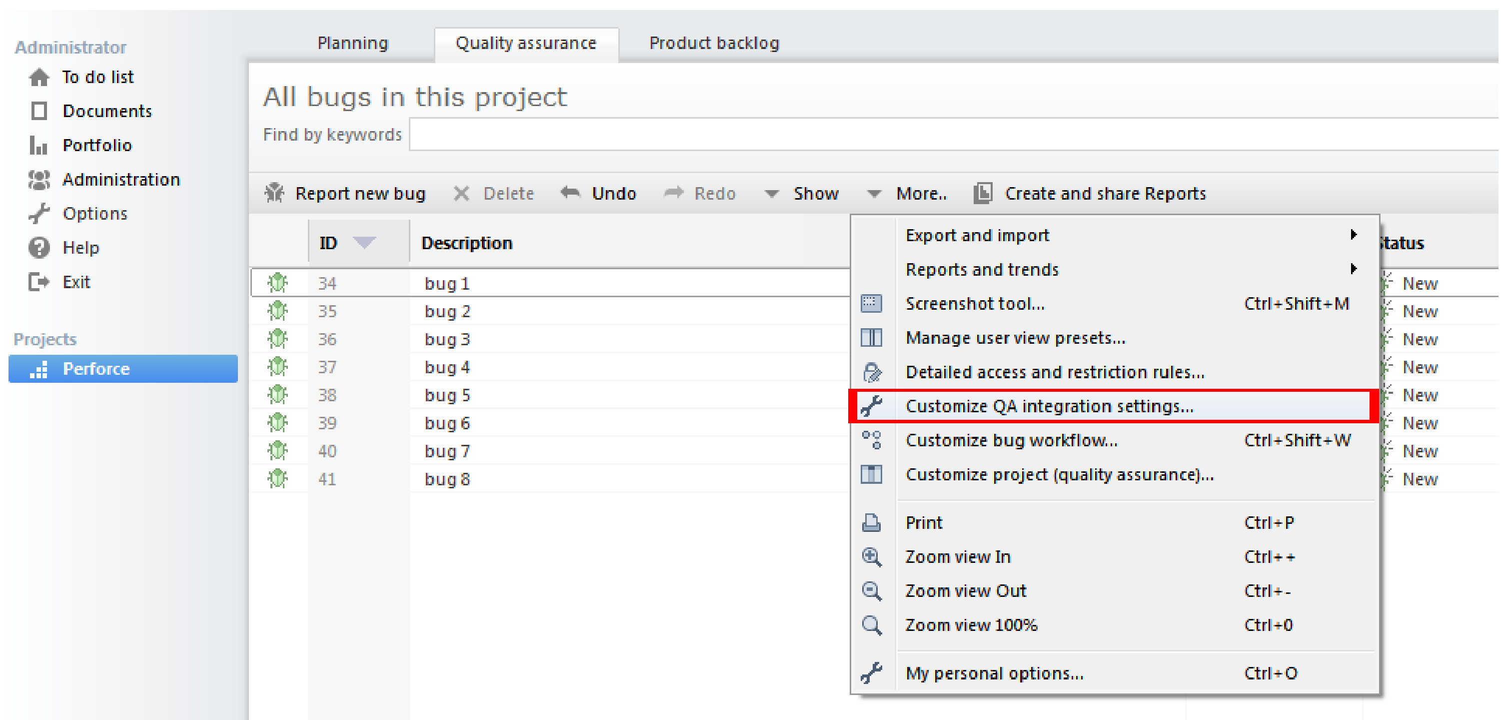

Hansoft - Hansoft Server - Administrator - 7.1080
Administrator
To do list
Documents
Portfolio
Administration
Options
Help
Exit
Projects
Small Agile
Example project
Chat rooms
Users
Projects
Shares
Create new project
Delete project
Edit project
Add/remove users to project
More..
Projects at Company Projects
Project name
Number of members
Main manager(s)
App with Kanban
2 members
Example Proj Manager
(Archived) Casual Game
1 member
Example Proj Manager
Example project
3 members
Main manager has not been selected
Large Game
2 members
Example Proj Manager
(Archived) Portfolio Plan
2 members
Example Proj Manager
Small Agile
3 members
Example Proj Manager
Software Program
2 members
Example Proj Manager
Settings for members of Example project
Member name
Is a main manager
Limited visibility
Can access project history
Administrator
No
No
No
Example Proj Manager
No
No
No
Example Team User
No
No
No
HANSOFT
Server license
The current license period will end in 2347 days on this date:
2020-01-01
Your license allows you to create 50000 more users on this server
Upgrade license
Server hostname
Used by clients to connect to the Hansoft Project Server
Edit hostname
E-mail
Connect Hansoft Project Server to your company's e-mail server:
Configure e-mail
View e-mail status
More settings
Security policy
Document policy
Comment thumbnail policy
Chat policy
Perforce
Perforce global settings



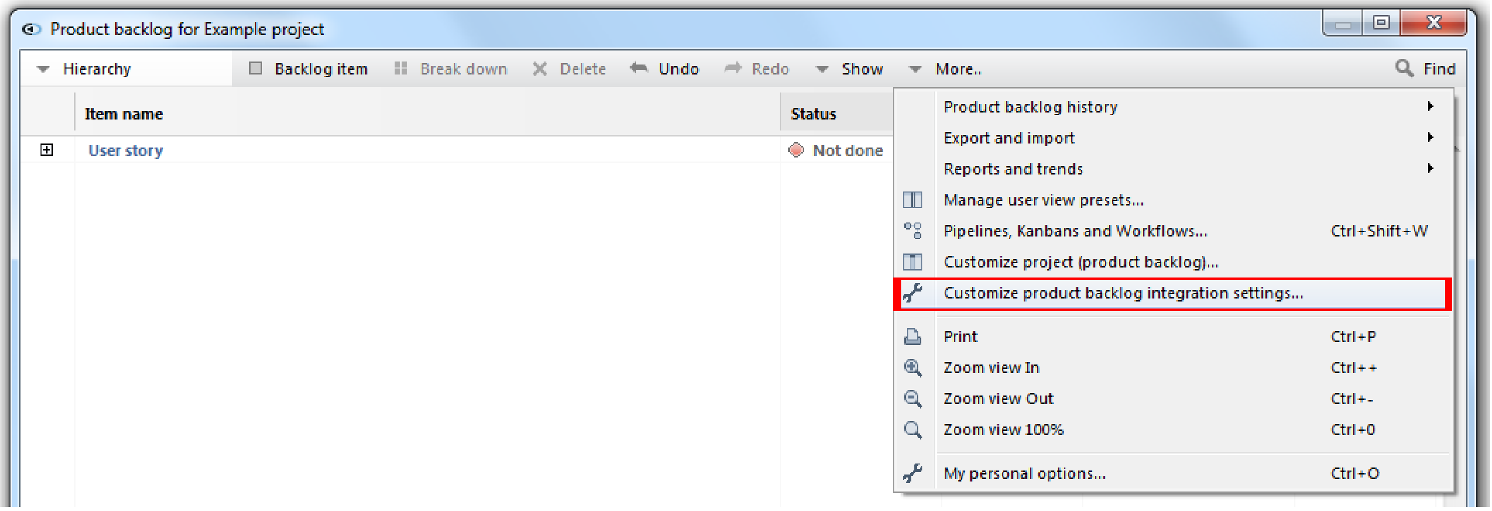
Accessing the Project Integration settings (configures main project, the backlog and the QA sections):



Accessing the QA Perforce integration settings:

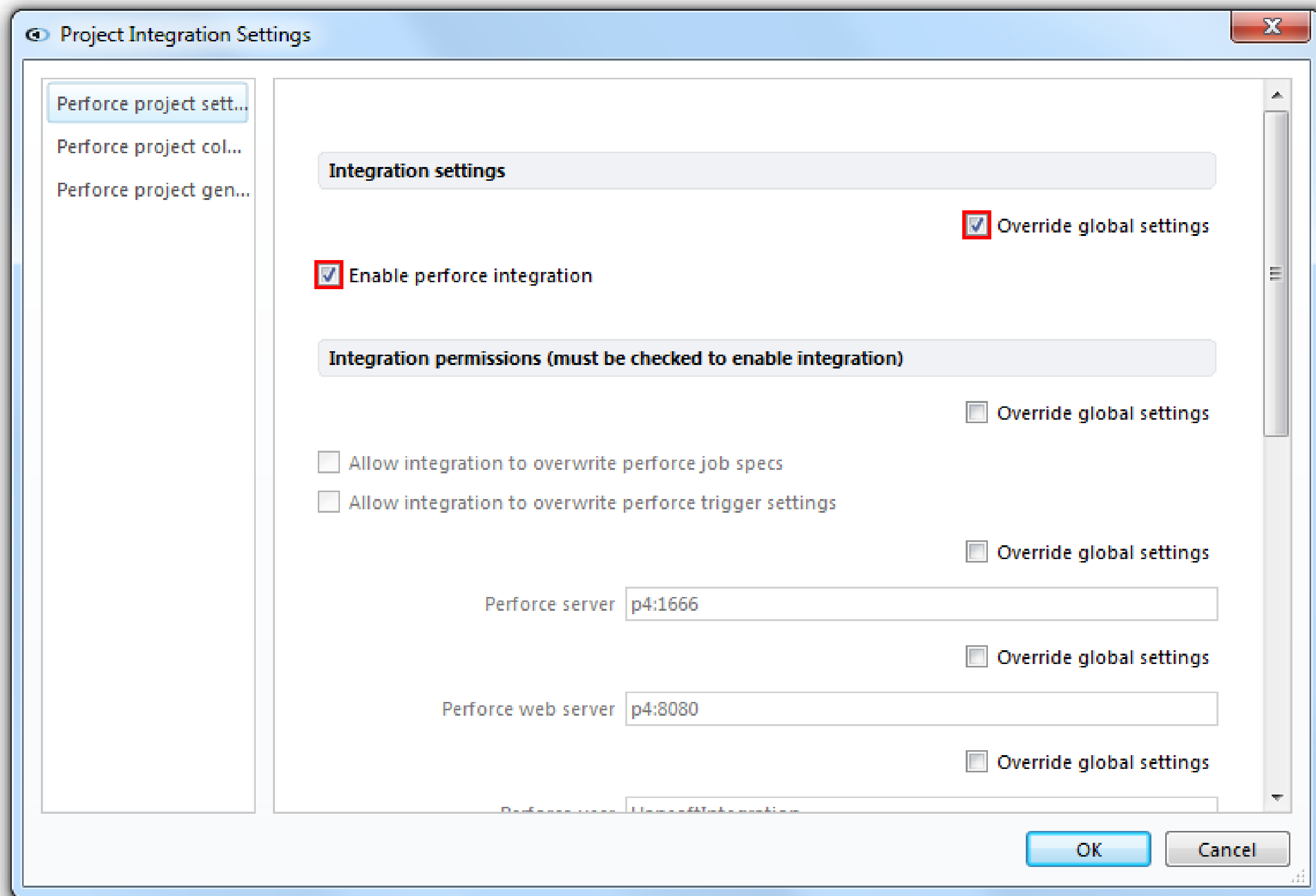


Accessing the backlog Perforce integration settings:

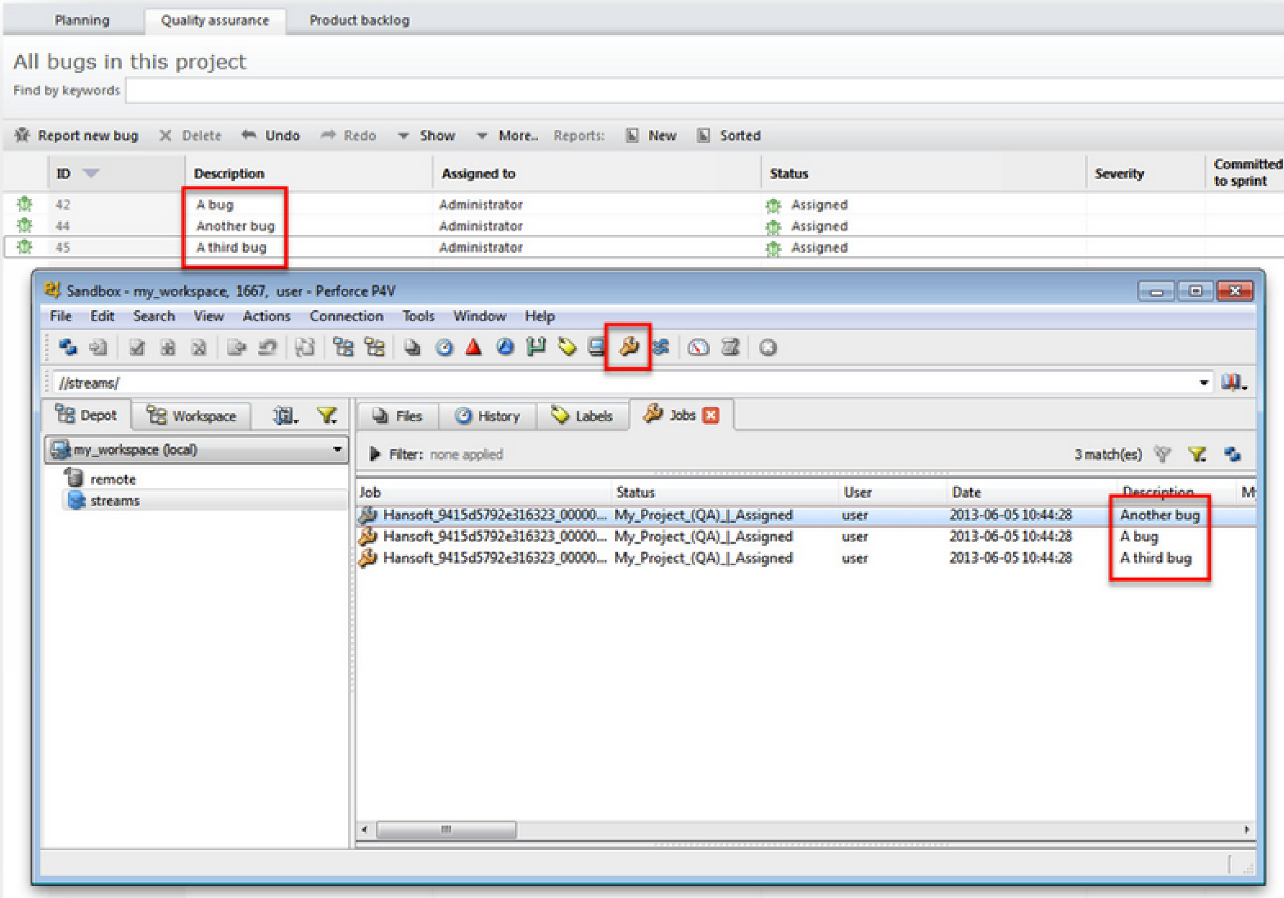


Workflow example

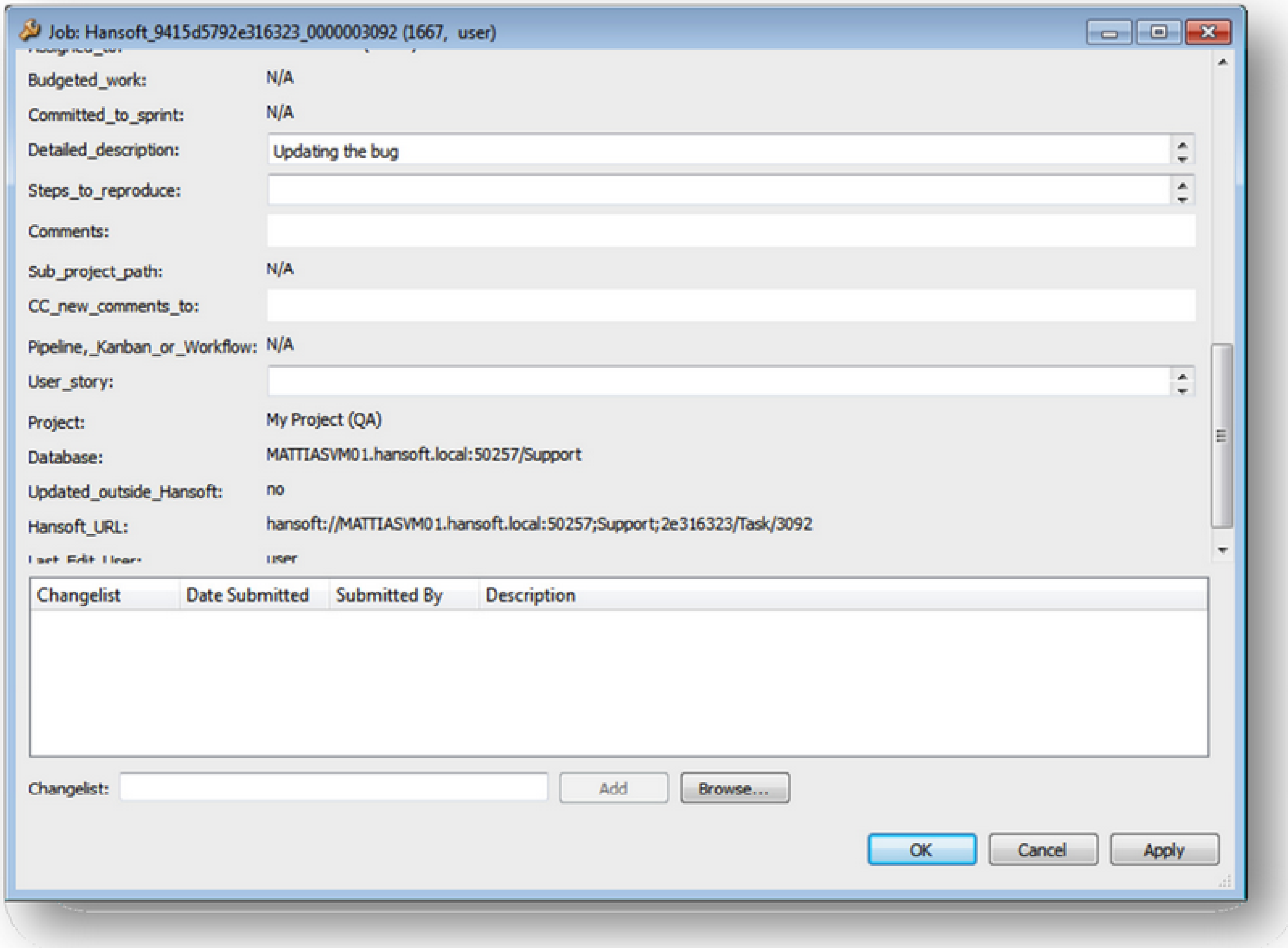
In this example we are going to enable the integration in the QA portion of one project:



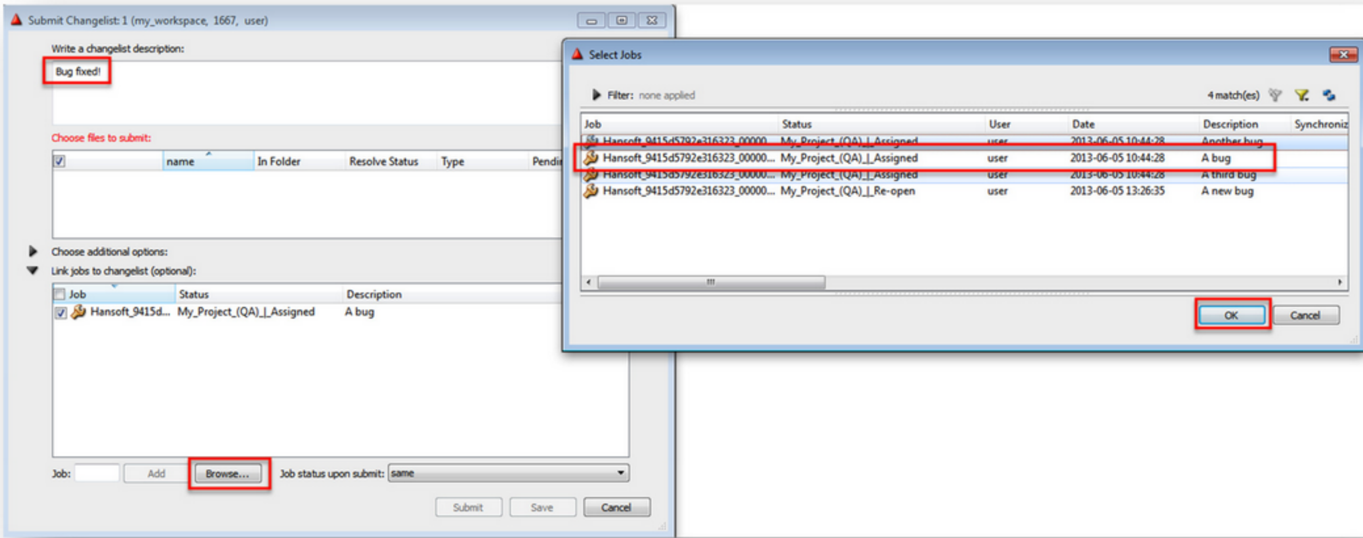
After enabling the Perforce integration for the QA section we can see the bugs as jobs in Perforce:



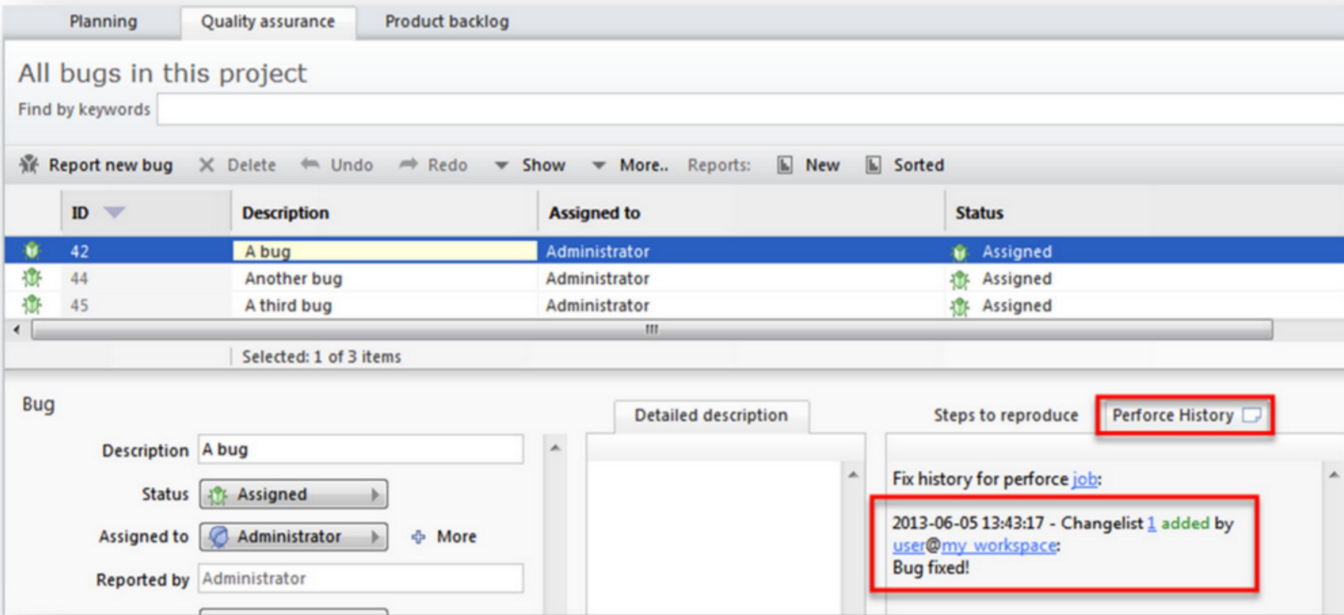
From P4V we are able to edit the job and change the properties of the bug:



When we submit a changelist that fixes a bug we add the job that corresponds to the bug that this changelist fixes:



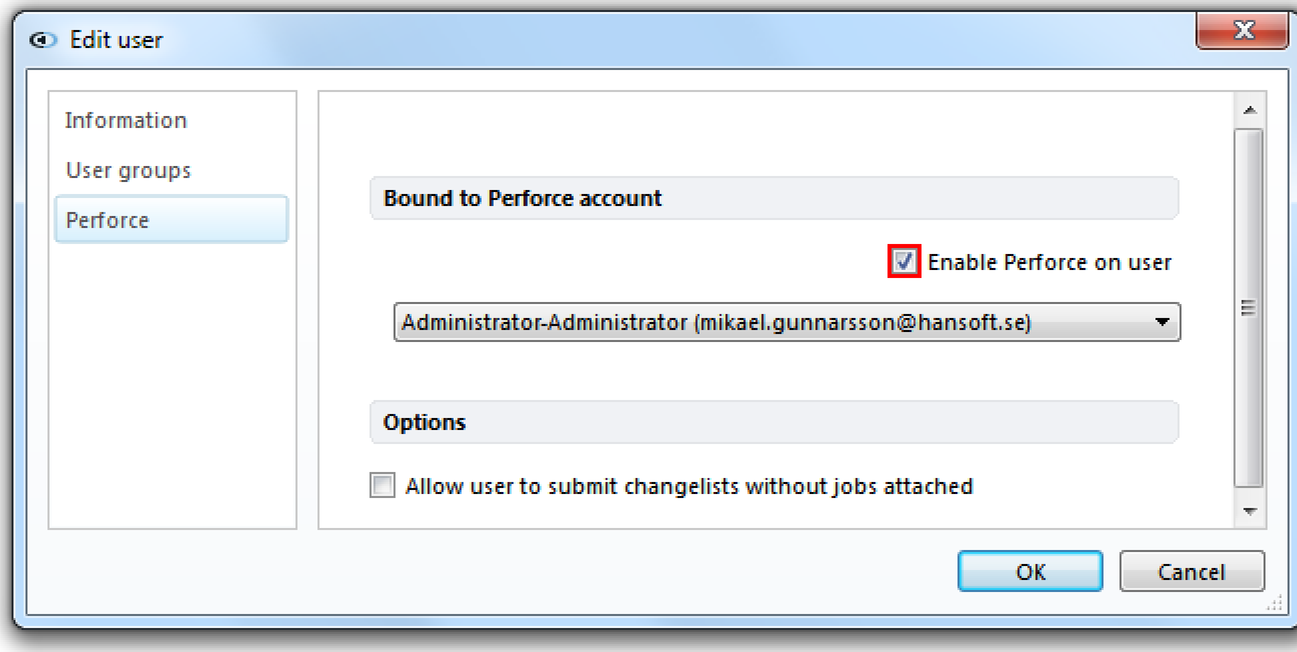
Within Hansoft, the change we made to the job is reflected and the changelist that we associated with the job is available under the Perforce History tab. If you have P4Web installed, the hyperlinks in Hansoft will open the corresponding page in P4Web:



Binding Hansoft users to Perforce users

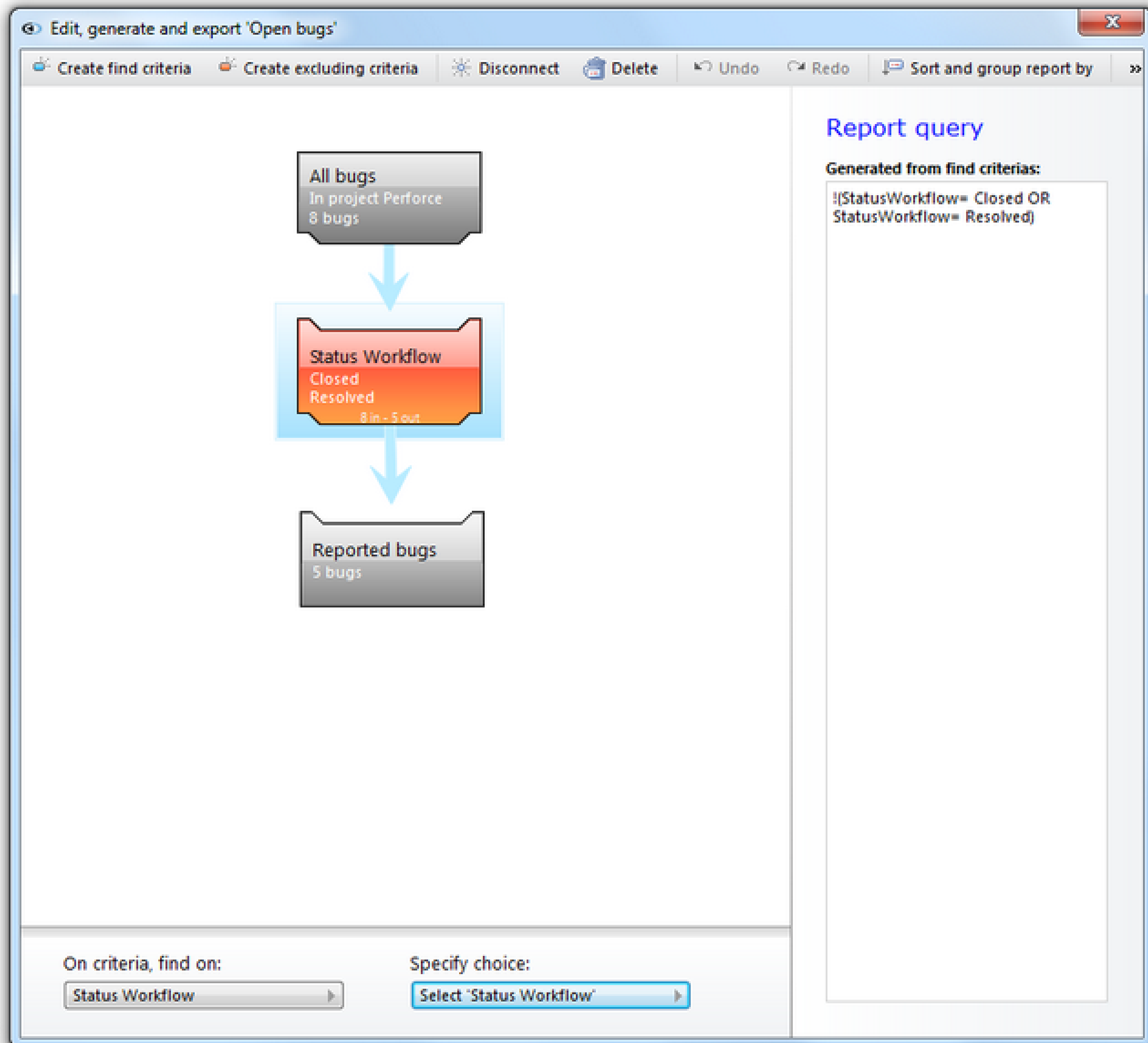
To be able to perform checks at submit, you have to bind Hansoft users to Perforce users. This is done under the Users tab in the Administration view. When you enable Perforce on a user the Perforce integration tries to do an automatic match based on name and email address.

You can also choose users manually from the list of all Perforce resources:

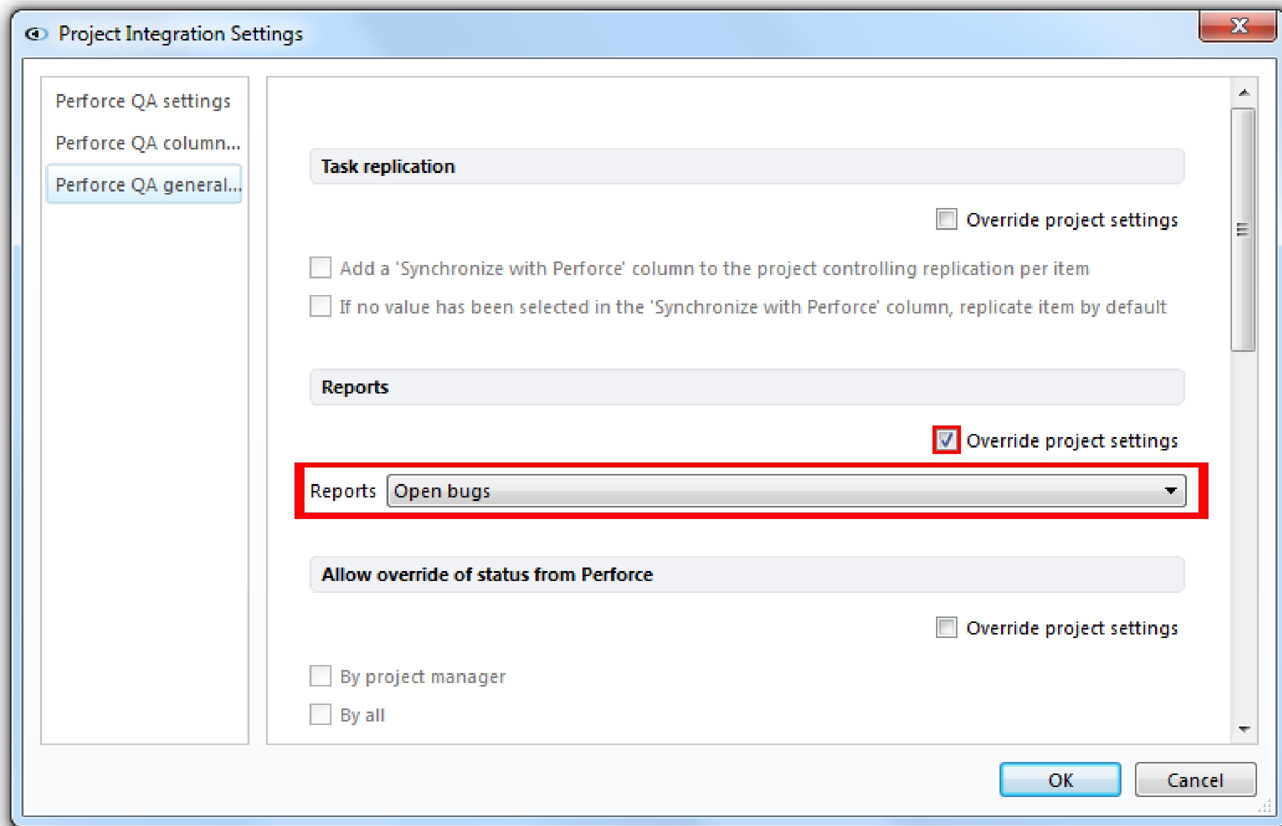


Using Hansoft reports to replicate tasks/bugs

You can use reports that you have created in Hansoft to select what tasks/bugs should be replicated to Perforce. Only tasks/bugs selected by the report will be replicated:

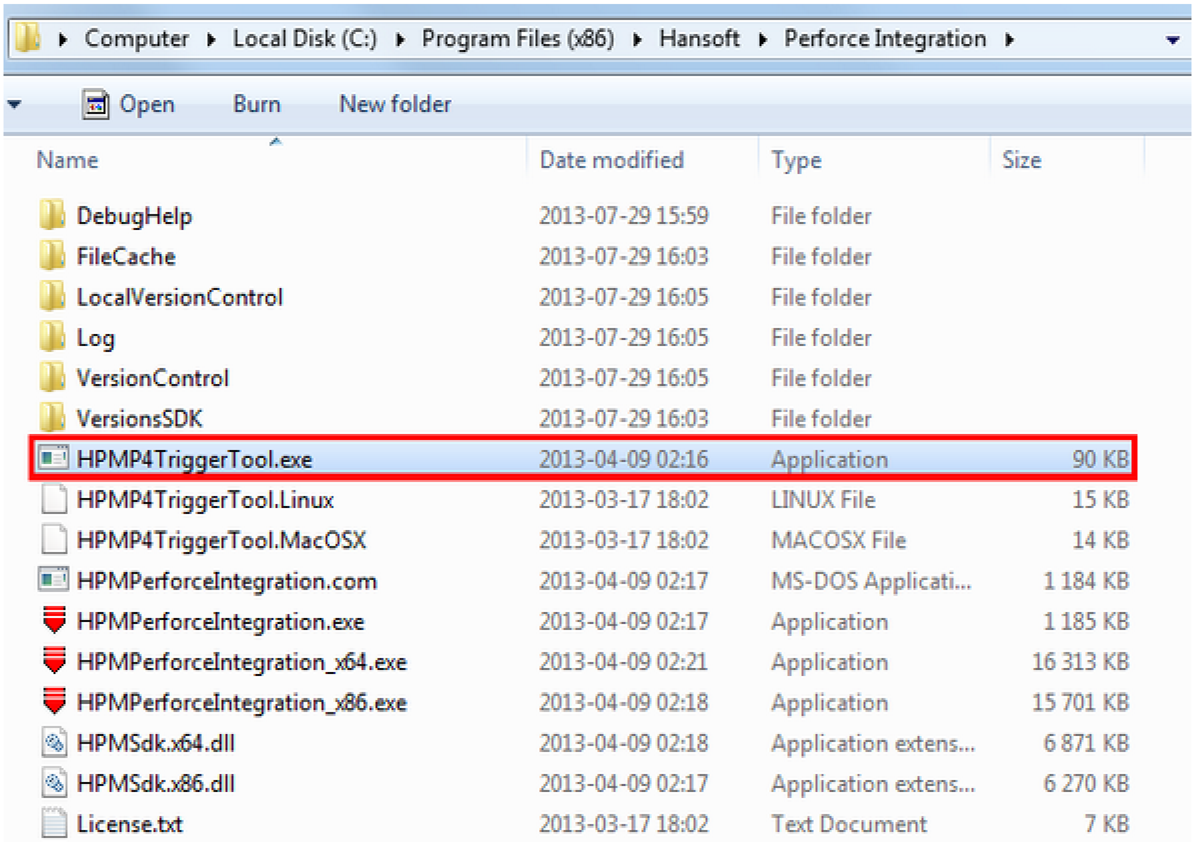


The report is selected under the general settings tab in the integration settings:

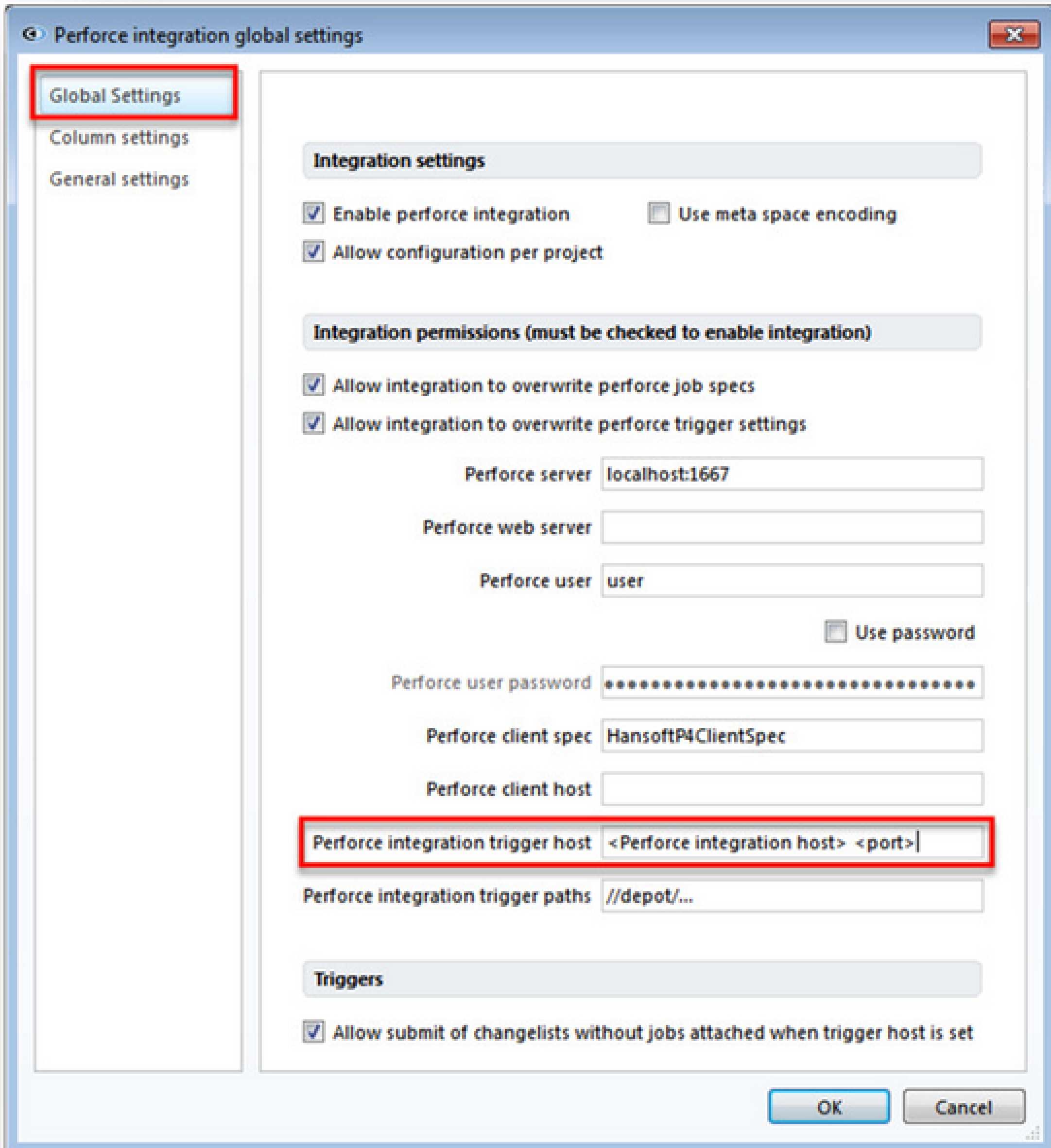


Using triggers for submit checks

When you change a status on submit or edit the Perforce integration performs a check to see if the new status is valid and the current user has the rights to transition to it. If this is not the case, the integration silently reverts the status. If you want feedback from Perforce you have to enable the trigger that is included with the Perforce integration. Under the Perforce integration install directory you will find an application called HPMP4TriggerTool. Copy this file to your Perforce installation directory:

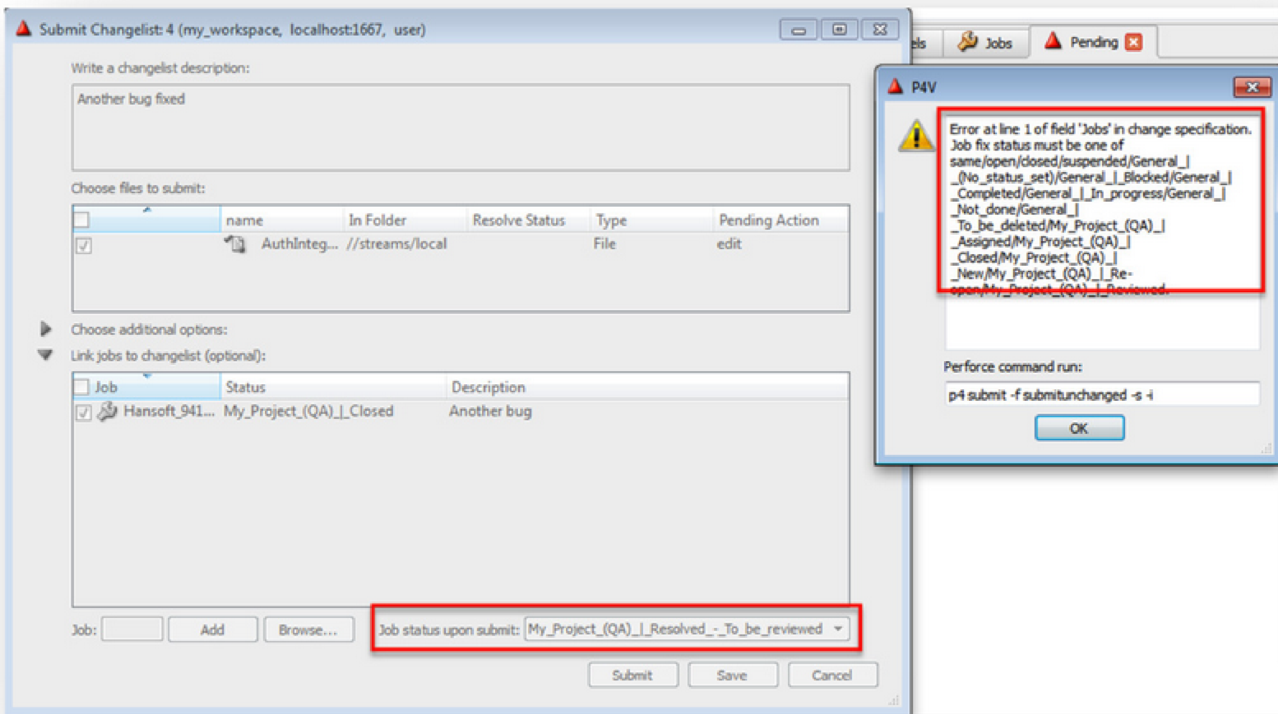


If you run Perforce on Mac OS X or Linux use the supplied binaries and rename them to HPMP4Triggertool. If you are another platform, compile the included source file. You can then turn on the trigger checks by entering a Perforce integration trigger host. The host name should be the name of the host where the Perforce integration is running and the optional port:

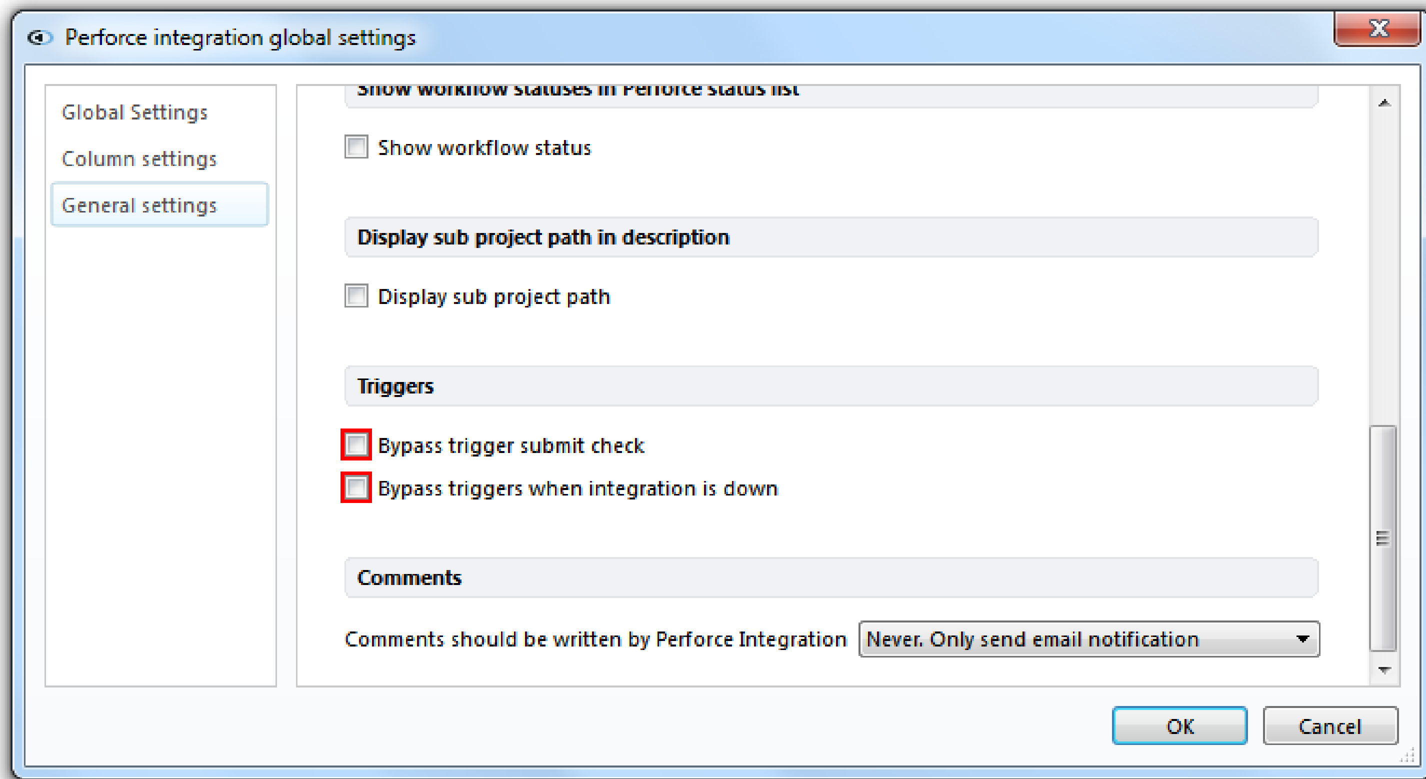


Perforce integration global settings
Global Settings
Column settings
General settings
Integration settings
Enable perforce integration
Use meta space encoding
Allow configuration per project
Integration permissions (must be checked to enable integration)
Allow integration to overwrite perforce job specs
Allow integration to overwrite perforce trigger settings
Perforce server
localhost:1667
Perforce web server
Perforce user
user
Use password
Perforce user password
Perforce client spec
HansoftP4ClientSpec
Perforce client host
Perforce integration trigger host
<Perforce integration host> <port>
Perforce integration trigger paths
//depot/...
Triggers
Allow submit of changelists without jobs attached when trigger host is set
OK
Cancel

The trigger now enables the Perforce integration to perform the submit checks before the actual Perforce submit and give feedback to the user:



There are two options to bypass the trigger check under general settings:



Personal Options

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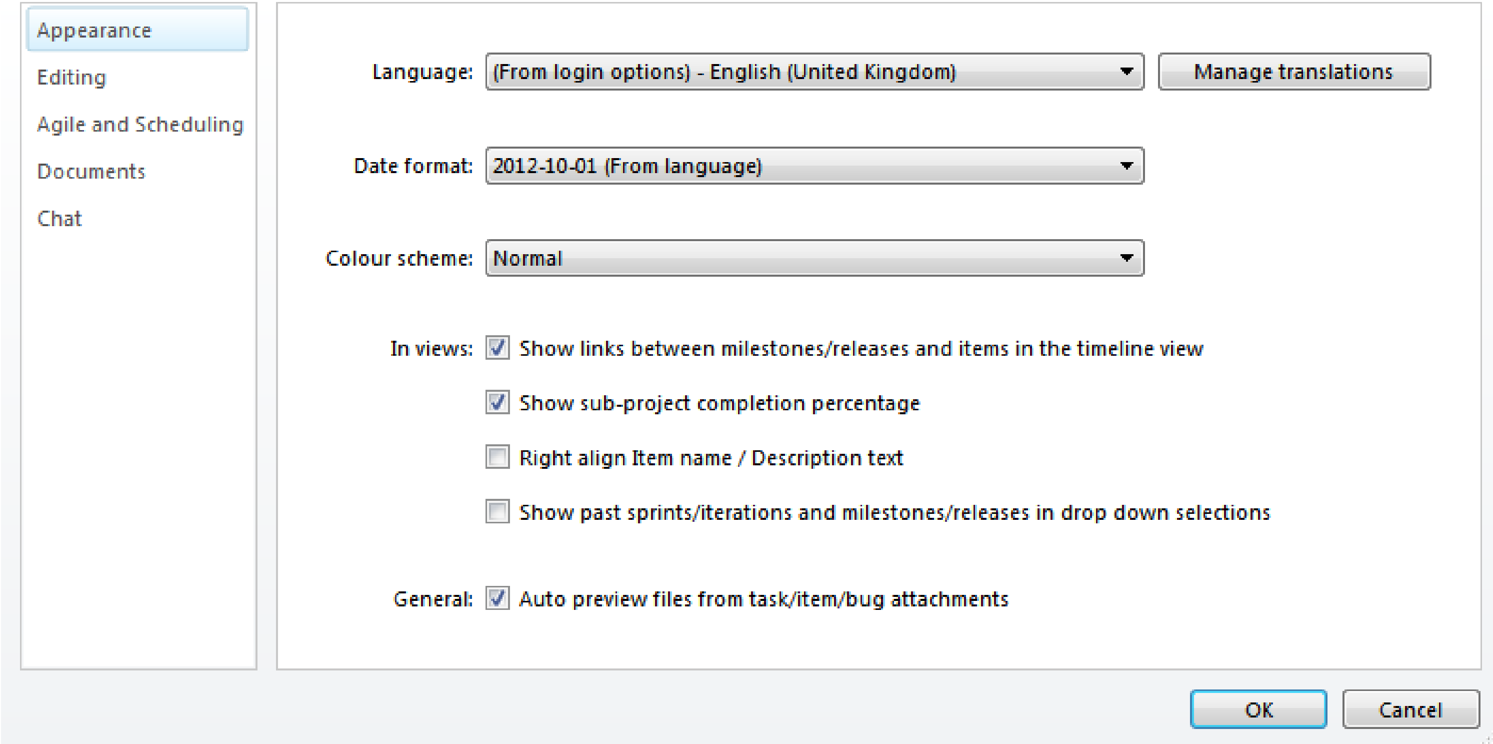
The Personal Options dialog is the central location for user preferences affecting various parts of Hansoft, involving localization, appearance, editing and planning options.

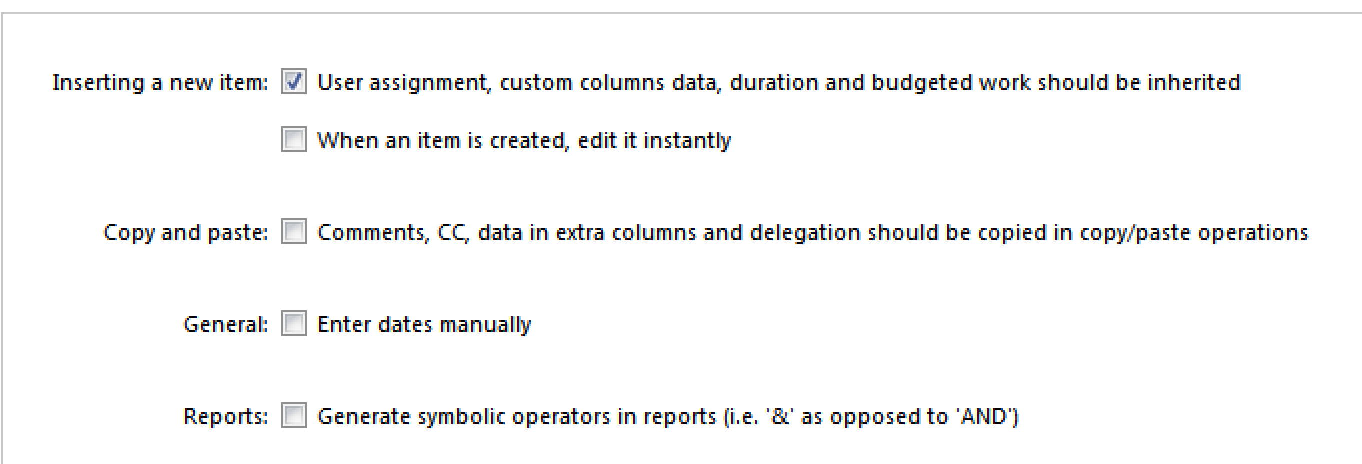


The Personal Options dialog

Appearance

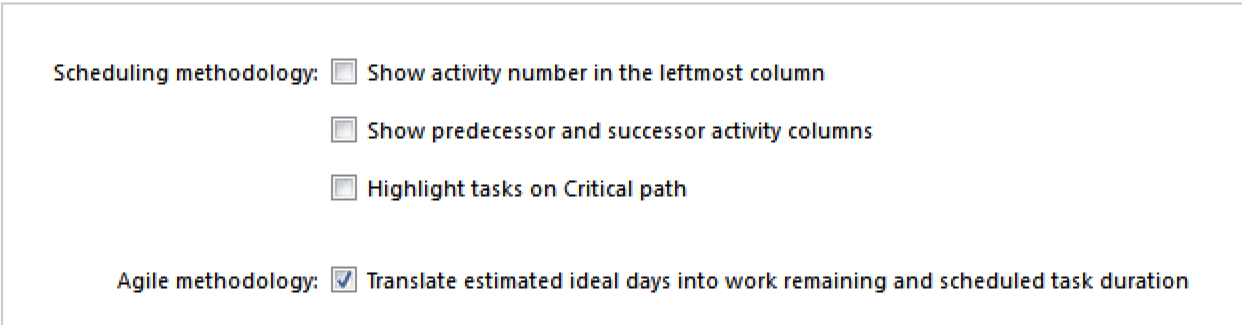
The Appearance section includes language, date format, color scheme and various visual features.

Editing



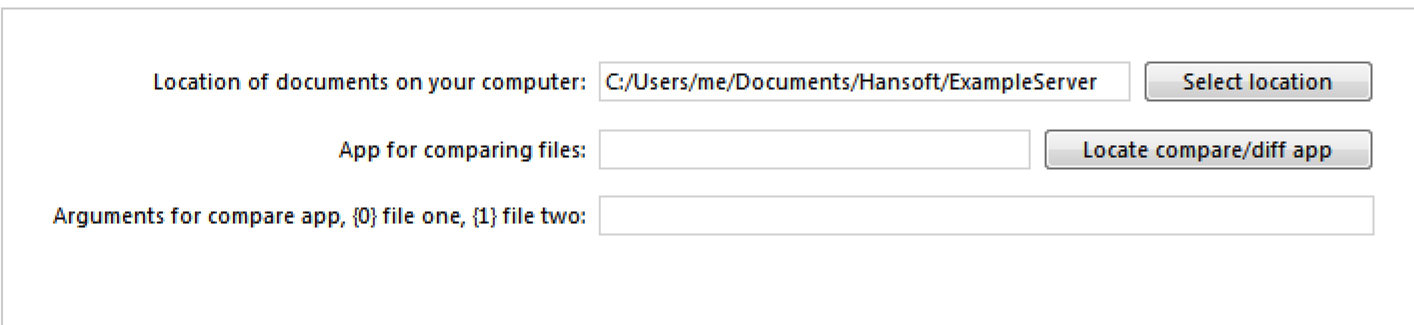
Under Editing, settings are available for how Hansoft deals with inserting and copying / pasting items.

Agile and Scheduling



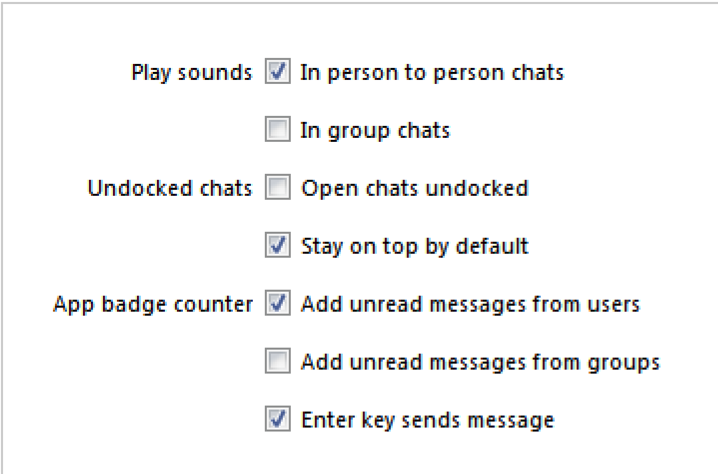
Agile and Scheduling provide options for both the Scheduling and Agile modes.

Documents



In Documents, users can specify a location for the local copies of documents from the Hansoft server, as well as an application to used when comparing files.

Chat



The Chat section includes preferences for sounds, badge counters, and how undocked chats should behave.

Setting an avatar

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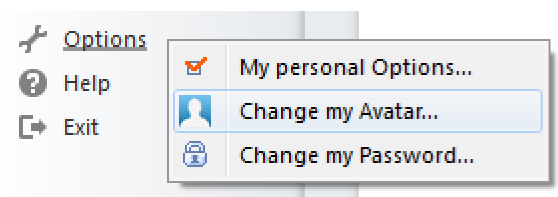
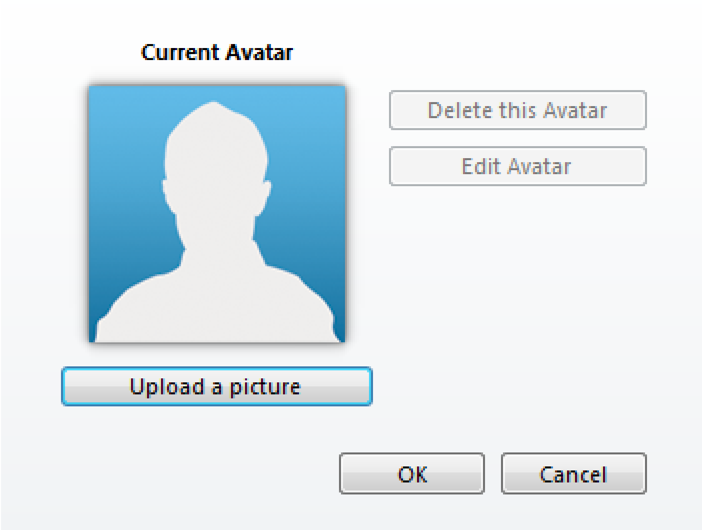
To make it easier to tell users apart, and add a bit of personal flair, users can be associated with an avatar, to be displayed in chats and news feed entries. This can be done either by the administrator, or, if given permission, by the users themselves.

Setting an avatar is done from the Options menu in the left-hand navigation pane.

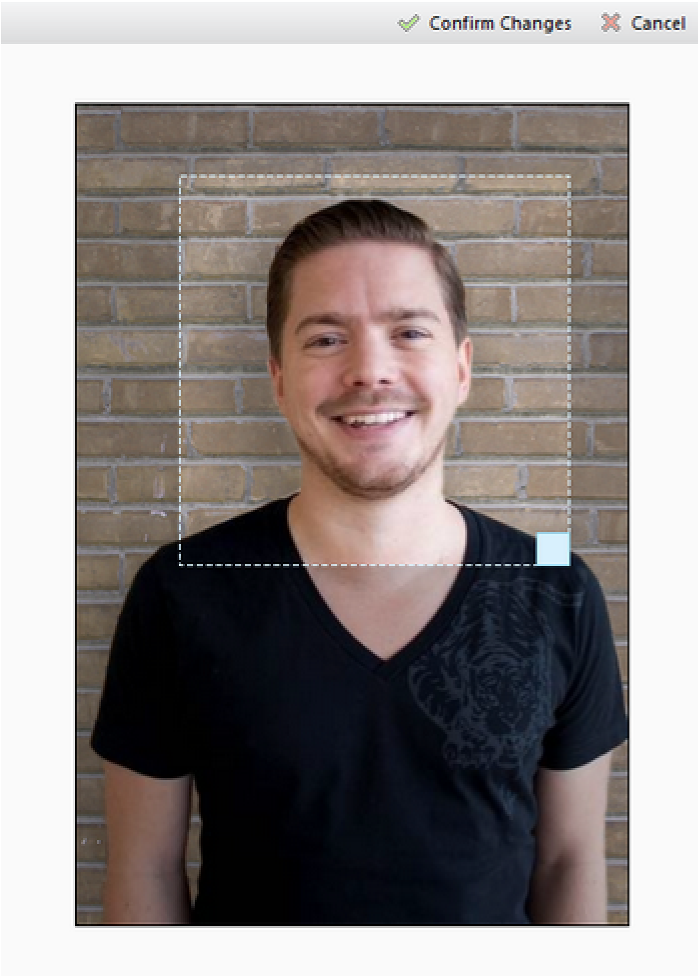


The Options menu



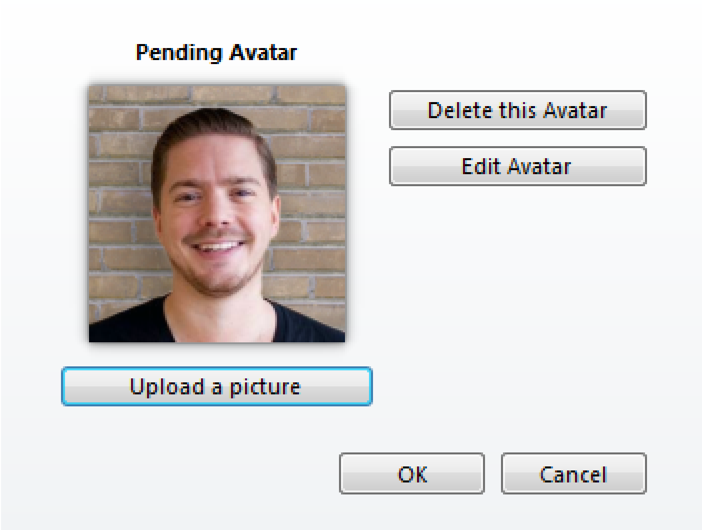
The Avatar dialog

Clicking Upload a picture will prompt the user for an image file from their local harddrive. It can be any size, and in any of the formats PNG, BMP, JPG and GIF.



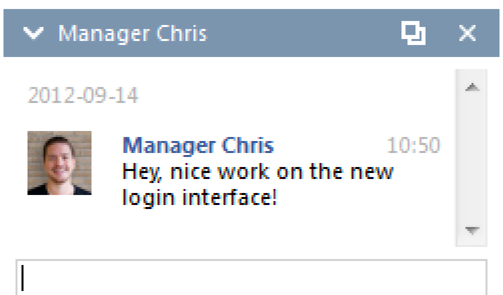
The cropping tool

Once uploaded, the image can be cropped (Avatar images have a 1:1 aspect ratio). This cropping is non-destruct-ive, so the user can go back and choose a more suitable one even after the Avatar image has been saved.



The Avatar dialog after a successfully uploaded picture

After saving the Avatar, it will be used in various places, such as chat windows, user assignment dialogs and in News feed entries.



The Avatar in use

Import Microsoft Project data

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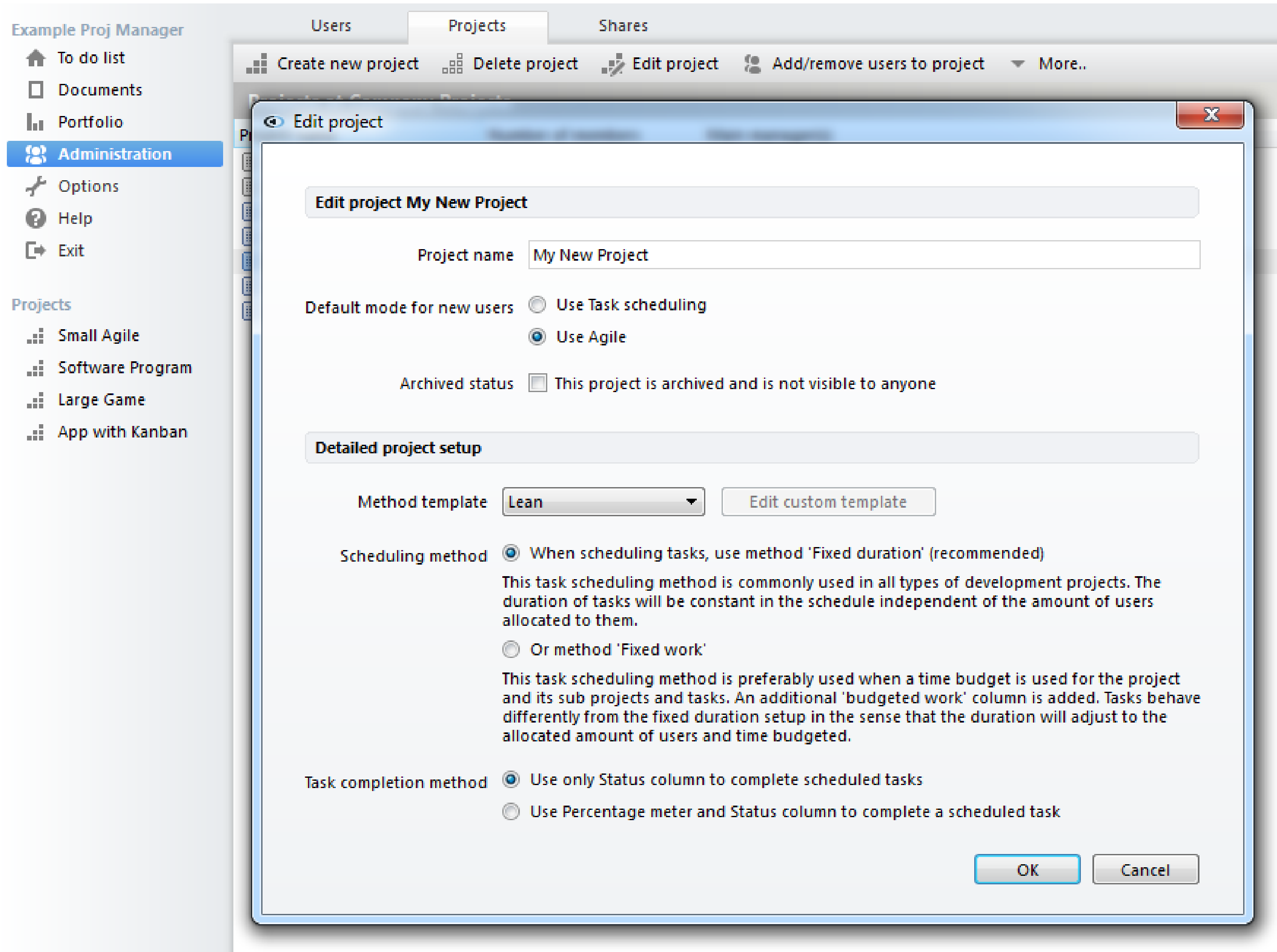
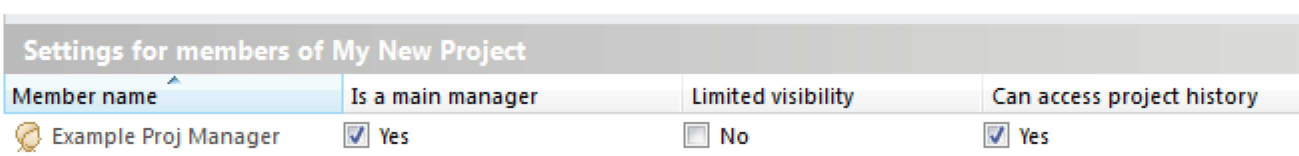
1. Open Microsoft® Project 2003® or later and the project file. Select Save As and save the file in XML format (do not use export).

2. Open Hansoft and create a new project under Administration >> Projects >> Create project.

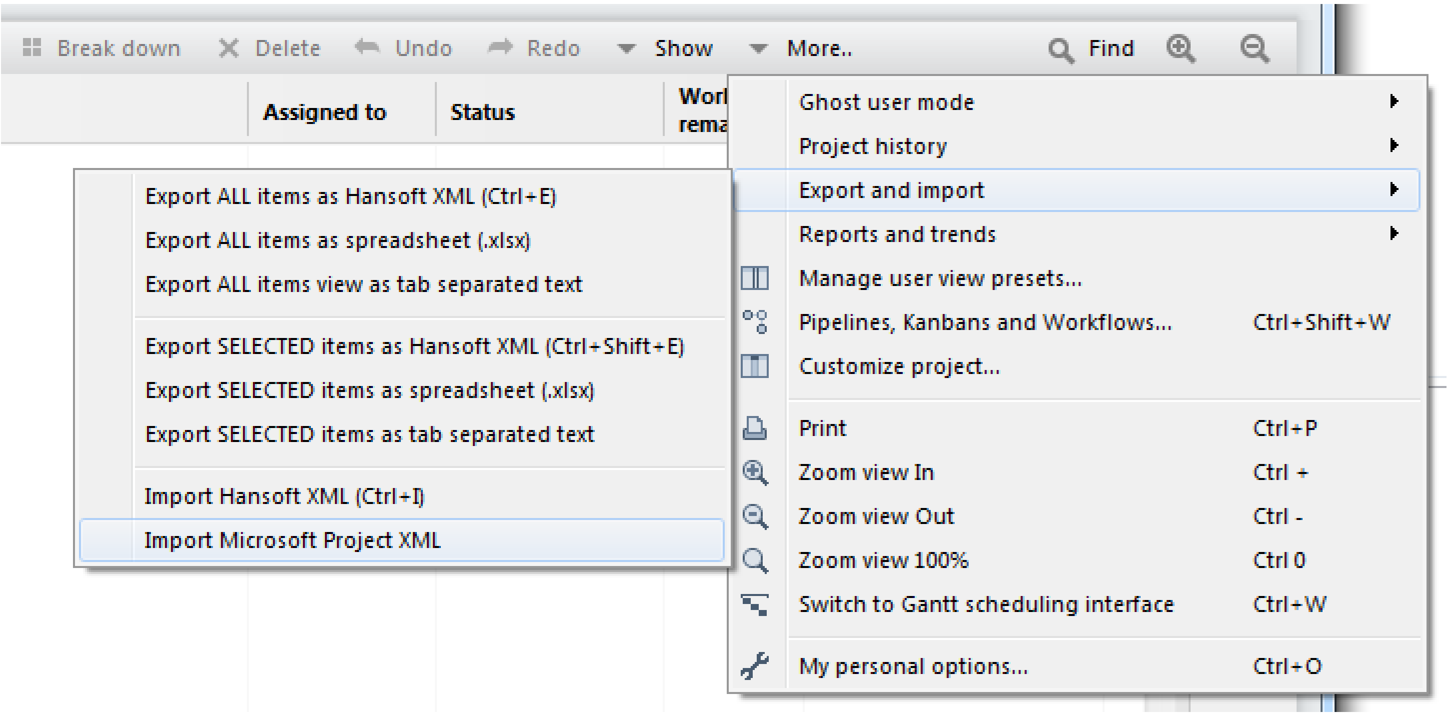


3. Make yourself a main project manager by click on the Is a main project manager checkbox in the bottom window:



4. Go to the project you created. Press "More.." on the main toolbar, select Export and Import and Import

Microsoft Project XML in the menu.



5. Open the XML file you "Saved As" (not exported) from Microsoft® Project 2003®. Tasks and users will now be created.

Paste as tasks / items / bugs from Windows clipboard

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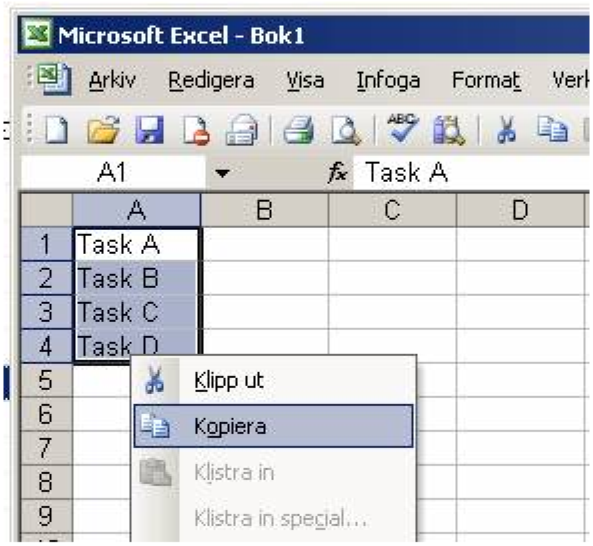
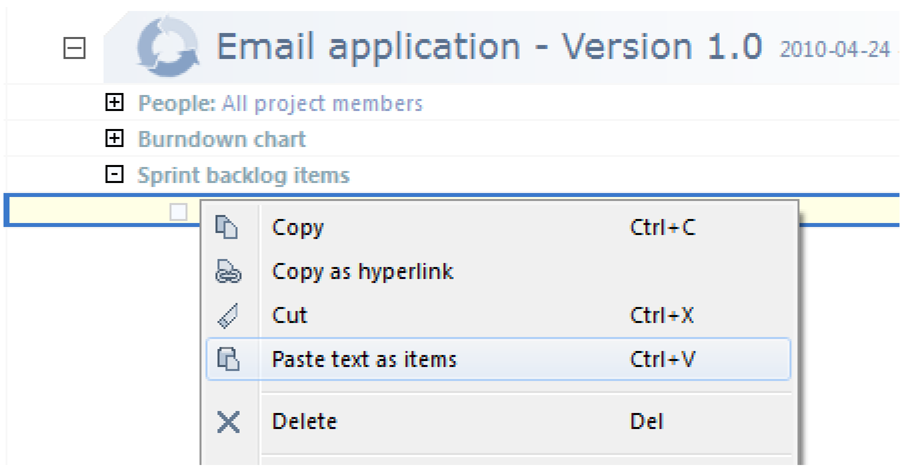
1. In Microsoft® Excel®, for example, write text within a couple of cells (this can be utilized within any program that has the capacity of copying text to the Windows® clipboard, Notepad for example).



2. Select and copy the cells and text (keyboard shortcut Ctrl + C) on Windows and (Cmd + C)on OSX.

3. Open Hansoft and select "Paste as new items (based on text clipboard)":



Security

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This is a page giving information about possible causes and solutions to the trust verification error displayed when connecting to a Hansoft server.

Troubleshooting

For help in addressing problems with connection security, proceed to the Troubleshooting section.

Information about certificates

You can read more about security in Hansoft in the Certificates section.

Certificates

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Because the Hansoft client downloads executable code from the server, identity verification and trust play a key role in ensuring the integrity of communication.

Hansoft employs the industry standard AES-256 encryption algorithm for all communication between the client and the server. Additionally, from version 7.0, both client and server utilize X.509 certificate-based authentication and key exchange provided by the OpenSSL library.

This is done to protect clients from hacked servers, and to protect servers from clients running on unauthorized machines, minimizing security risks such as identity theft, eavesdropping and unauthorized access to sensitive information.

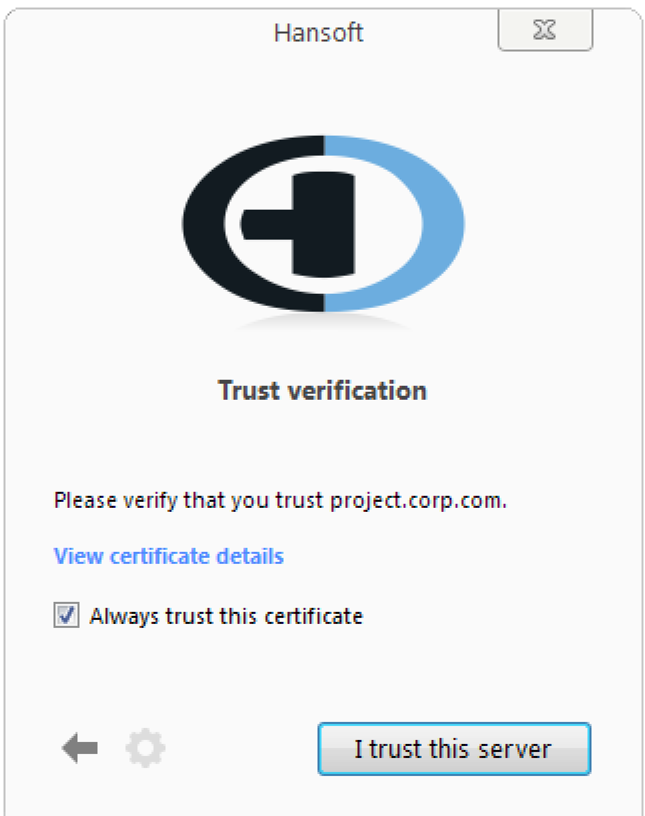
This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit. (http://www.openssl.org/)

Certificates

In order to facilitate secure communication, the Hansoft server can be configured with a certificate issued from a Certificate Authority -- an entity in a chain of trust stemming from a number of established root authorities. By accepting the certificate, the user indicates that they trust the Certificate Authority, and therefore the server they're connecting to, and that the connection is allowed to continue.

In addition, servers can be self-signed, in which case a Certificate Authority is not involved. Upon connecting for the first time, the user will be notified of this.

Logging in to a secure server



The login screen prompting the user to verify trust of the server

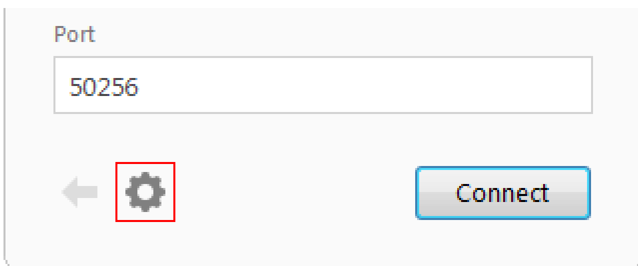
When first connecting to a server, the user is presented with a Trust verification dialog. Before accepting the certificate, the user may review the details by clicking the View certificate details link. If there are critical errors, these will be indicated. For more information about troubleshooting security, read the Troubleshooting section.

Trusting a certificate

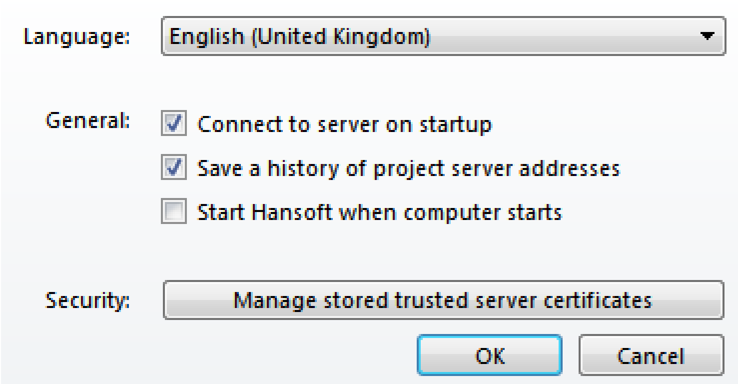
If the information provided in the certificate appears to be legitimate, the user accepts the connection, and proceeds to log in to the server. Certificates can be stored permanently by checking the Always trust this certificate checkbox. The server is now considered trusted by the client, and further notices will be suppressed as long as the certificate remains valid.

Removing a certificate

Should the user ever wish to rescind a certificate, the Connection options dialog contains a section for managing certificates.

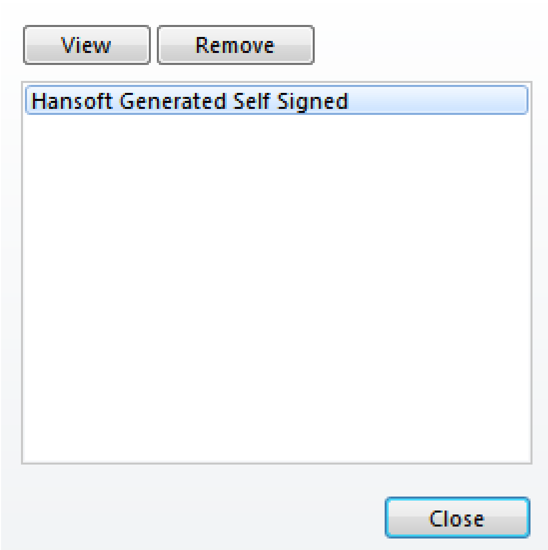


The connection dialog



The connection options dialog

Clicking the Manage stored trusted server certificates button will display a list of certificates the user has previously trusted. By clicking Remove, the certificate is deleted, and upon the next connection, the user will again be asked to verify trust in the certificate.



The list of certificates

Troubleshooting

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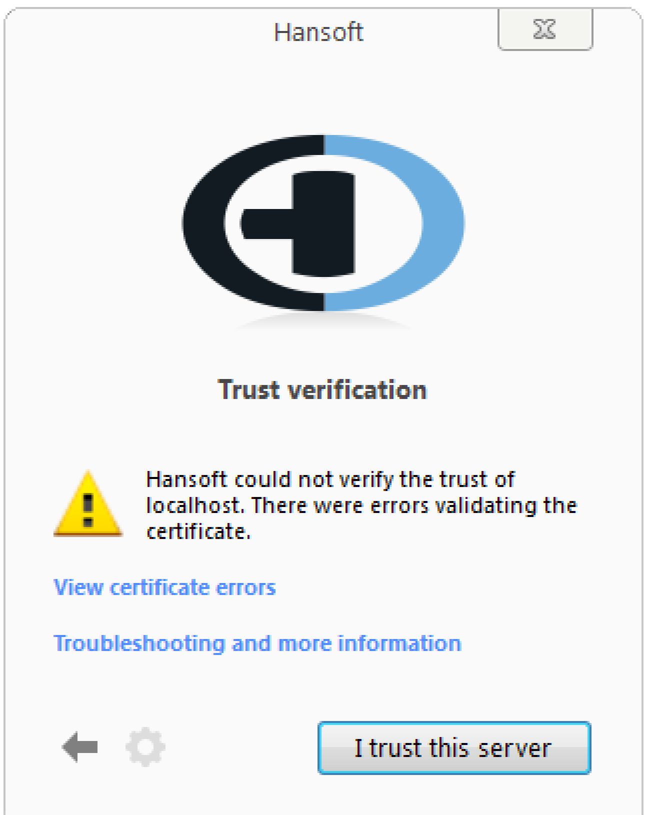
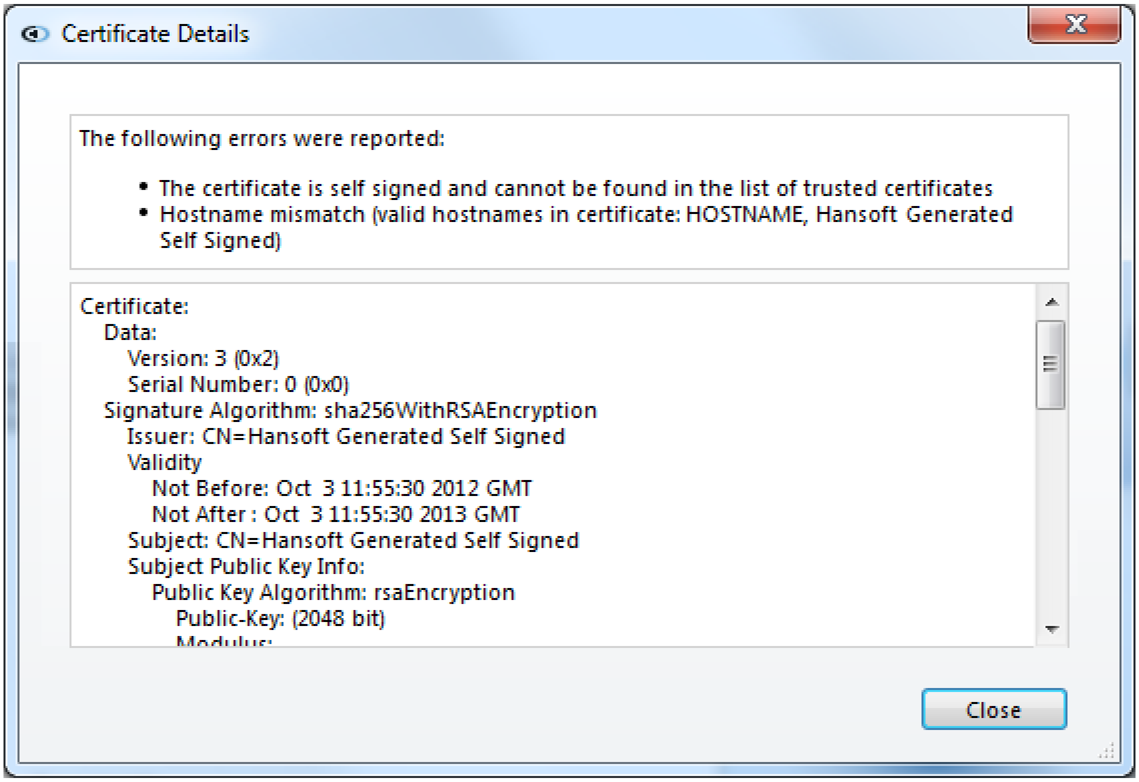


Trust verification error dialog

When the trust verification dialog indicates an error, clicking the link will diplay the certificate details page. The top frame indicates the type of errors that were found. Read below for troubleshooting instructions on the most common errors.

Hostname mismatch



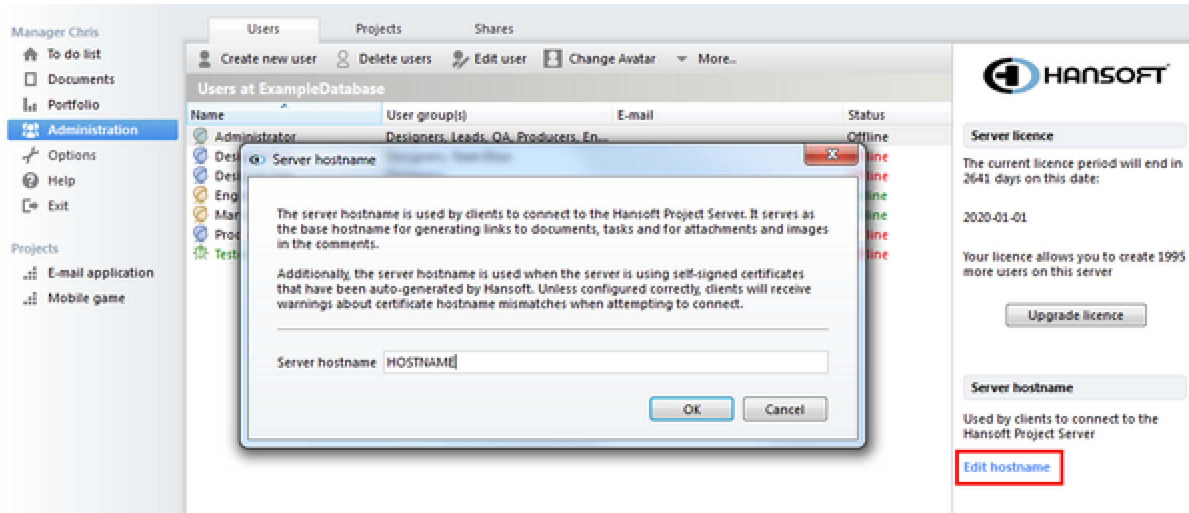
A hostname mismatch error

Trust verification validation errors usually occur because of hostname mismatches. Most commonly, the hostname in the certificate issued by the server is missing, or different, from the one that your client connected to. There may be several causes of this mismatch.

Server hostname is not specified, or is incorrect

Note: This has to be addressed by an Administrator

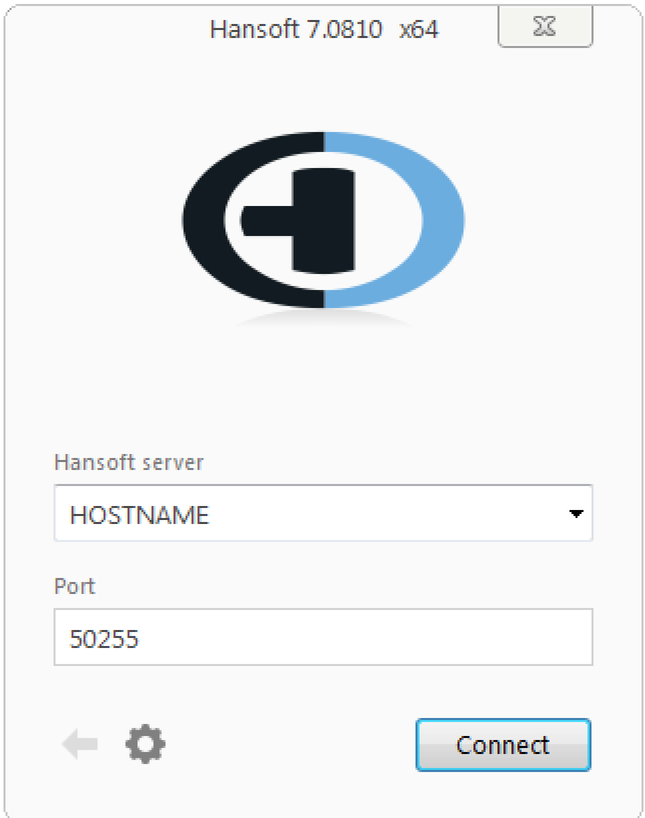
In the Administration sidepanel, click the Edit hostname link under the Server hostname section. Fill in the server hostname that your users would use to connect to the server. An example would be hansoftserver.mycompany.com.



Connecting to a server via the wrong hostname

For example, you might have specified your computer name (e.g. MYWORKSTATION) as the server hostname, but are trying to connect to localhost.

Solution: Make sure you're connecting to the same hostname as has been specified in the Server hostname field (as described in the section about Server hostname).



Hostname not found in certificate

Your system administrator may have provided Hansoft with certificates that do not contain the hostname you are attempting to connect to. The system administrator's guide provides further information on where Hansoft looks for hostname information in a certificate.

Compromised server

The server you are connecting to may not be what it says it is. Contact your system administrator, and verify the integrity of your Hansoft server.

Keyboard shortcuts

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Notice: This page applies to Hansoft version 7.1043 or later. If you are running an earlier version, view the older keyboard shortcuts here.

When editing text

When editing text in comments, user story, detailed description, steps to reproduce or a custom multi line column text you can use tags (such as <URL=www.hansoft.se>Hansoft</URL>). To save the change after editing tags, press Ctrl + S (⌘ + S).

To insert a tab in the text, press Ctrl + Tab (⌘ + Tab).

To insert an image when editing comment text, press Ctrl + V (⌘ + V).

To insert and immediately edit an image when editing comment text, press Ctrl + Shift + V (⌘ + Shift + V).

List of keyboard shortcuts sorted by function

Ctrl + R	⌘ + R	Add more users to task
Ctrl + Shift + A	⌘ + Shift + A	Arrange selected tasks
Ctrl + Shift + Number 1-9	⌘ + Shift + Number 1-9	Arrange tasks by extra column 1-9 numeric
Ctrl + Left	⌘ + Left	Collapse all under sub project
Ctrl + Shift + L	⌘ + Shift + L	Connect items by number
Ctrl + Shift + T	⌘ + Shift + T	Connect selected
Ctrl + C	⌘ + C	Copy to clipboard
Ctrl + Shift + W	⌘ + Shift + W	Customize bug workflow (in QA view)
Ctrl + X	⌘ + X	Cut to clipboard
Ctrl + Shift + G	⌘ + Shift + G	Delegate sub project to
Ctrl + Shift + D	⌘ + Shift + D	Disconnect selected tasks
Ctrl + Right	⌘ + Right	Expand all under sub project
Ctrl + Shift + Q	⌘ + Shift + Q	Find bugs committed to this sprint
Ctrl + Shift + U	⌘ + Shift + U	Flag as user story
Ctrl + Shift + C	⌘ + Shift + C	Go to item in Board view
Ctrl + Shift + V	⌘ + Shift + V	Go to item in Priority view
Ctrl + G	⌘ + G	Go to item in project view
Ctrl + Shift + X	⌘ + Shift + X	Go to item in Schedule view
Ctrl + I	⌘ + I	Import Hansoft XML
Tab	Tab	Indent selected items
Ctrl + N / Insert	⌘ + N	Insert new item
Ctrl + M	Ctrl + M	Insert release
Ctrl + U	⌘ + U	Insert scheduled sub project
Ctrl + Shift + B	⌘ + Shift + B	Link to task/item/bug
Ctrl + Shift + Home	⌘ + Shift + Home	Move connected items as far back as possible
Ctrl + Shift + Up / Down (Alt Gr + Up / Down)	⌘ + Shift + Up / Down	Move items/tasks vertically
Ctrl + D	⌘ + D	Open backlog
Ctrl + Shift + R	⌘ + Shift + R	Open reports dialog

Shift + Tab	⌘ + Tab	Outdent selected items
Ctrl + V	⌘ + V	Paste to clipboard
Ctrl + Shift + W	⌘ + Shift + W	Pipelines, kanbans and workflows
Ctrl + P	⌘ + P	Print
Ctrl + Y	⌘ + Y	Redo
Ctrl + Enter	⌘ + Enter	Reply to/post reply comment
Ctrl + K	⌘ + K	Save schedule in project history
Ctrl + Shift + M	⌘ + Shift + M	Screenshot tool (in QA view)
Ctrl + A	⌘ + A	Select all items
Ctrl + Shift + H	⌘ + Shift + H	Set hyperlink on selected items
Ctrl + S	⌘ + S	Show task in timeline view
Ctrl + T	⌘ + T	Sort selected tasks by start date
Ctrl + Number 1-9	⌘ + Number 1-9	Sort tasks by extra column 1-9 numeric
Ctrl + W	⌘ + W	Switch between agile and gantt scheduling interface
Ctrl + Shift + P	⌘ + Shift + P	Tag to multiple releases
Ctrl + L	⌘ + L	Tag to nearest release
Ctrl + F	⌘ + F	Toggle find window
Ctrl + Shift + O	⌘ + Shift + O	Toggle ghost user mode
Ctrl + Z	⌘ + Z	Undo
Ctrl + Shift + I	⌘ + Shift + I	View change history
Ctrl + O	⌘ + O	View options
Ctrl + J	⌘ + J	View project history
Ctrl + Shift + S	⌘ + Shift + S	View selected items only
Ctrl + 0	⌘ + 0	Zoom view 100%
Ctrl + Plus	⌘ + Plus	Zoom view in
Ctrl + Minus	⌘ + Minus	Zoom view out

List of keyboard shortcuts sorted by keyboard key

Alt Gr + up/down		Move items/tasks vertically
Ctrl +	⌘ +	Expand all under sub project
Ctrl+Enter	⌘ + Enter	Reply to/post reply comment
Ctrl +	⌘ +	Collapse all under sub project
Ctrl + Shift + up/down	⌘ + Shift + up/down	Move items/tasks vertically
Ctrl + A	⌘ + A	Select all activities
Ctrl + C	⌘ + C	Copy to clipboard
Ctrl + D	⌘ + D	Open backlog
Ctrl + F	⌘ + F	Switch find window
Ctrl + G	⌘ + G	Go to task/item in project view
Ctrl + I	⌘ + I	Import Hansoft XML

Ctrl + J	⌘ + J	View project history
Ctrl + K	⌘ + K	Save schedule in project history
Ctrl + L	⌘ + L	Link tasks to nearest milestone
Ctrl + M	Ctrl + M	Insert milestone
Ctrl + N / Insert	⌘ + N / Insert	Insert new activity/item
Ctrl + Number 1-9	⌘ + Number 1-9	Sort extra column 1-9 numeric
Ctrl + O	⌘ + O	View options
Ctrl + P	⌘ + P	Print
Ctrl + Q	⌘ + Q	Move selected items to current sprint or backlog
Ctrl + R	⌘ + R	Add more users to activity
Ctrl + S	⌘ + S	Show activity in timescale view
Ctrl + Shift + A	⌘ + Shift + A	Arrange selected tasks
Ctrl + Shift + B	⌘ + Shift + B	Link to task/item/bug
Ctrl + Shift + C	⌘ + Shift + C	Go to item in Wall view
Ctrl + Shift + D	⌘ + Shift + D	Disconnect
Ctrl + Shift + G	⌘ + Shift + G	Delegate sub project to..
Ctrl + Shift + H	⌘ + Shift + H	Set hyperlink on selected
Ctrl + Shift + Number 1-9	⌘ + Shift + Number 1-9	Arrange extra column 1-9 numeric
Ctrl + Shift + O	⌘ + Shift + O	Toggle ghost user mode
Ctrl + Shift + P	⌘ + Shift + P	Link to multiple milestones
Ctrl + Shift + R	⌘ + Shift + R	Open reports dialog
Ctrl + Shift + S	⌘ + Shift + S	View selected only
Ctrl + Shift + T	⌘ + Shift + T	Connect selected
Ctrl + Shift + V	⌘ + Shift + V	Go to item in Priority view
Ctrl + Shift + X	⌘ + Shift + X	Go to item in Hierarchy view
Ctrl + T	⌘ + T	Sort selected by start date
Ctrl + U	⌘ + U	Insert scheduled sub project
Ctrl + V	⌘ + V	Paste to clipboard
Ctrl + W	⌘ + W	Switch between agile and task scheduling interface
Ctrl + X	⌘ + X	Cut to clipboard
Ctrl + Y	⌘ + Y	Redo
Ctrl + Z	⌘ + Z	Undo
Tab	Indent selected activities	

Keyboard shortcuts (older releases)

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When editing text

When editing text in comments, user story, detailed description, steps to reproduce or a custom multi line column text you can use tags (such as <URL=www.hansoft.se>Hansoft</URL>). To save the change after editing tags, press Ctrl + S (⌘ + S).

To insert a tab in the text, press Ctrl + Tab (⌘ + Tab).

To insert an image when editing comment text, press Ctrl + V (⌘ + V).

To insert and immediately edit an image when editing comment text, press Ctrl + Shift + V (⌘ + Shift + V).

List of keyboard shortcuts sorted by function

Ctrl + R	⌘ + R	Add more users to activity
Ctrl + Shift + Number 1-9	⌘ + Shift + Number 1-9	Arrange extra column 1-9 numeric
Ctrl + Shift + A	(⌘ + Shift + A)	Arrange selected tasks
Ctrl + Left	⌘ + Left	Collapse all under sub project
Ctrl + Shift + T	⌘ + Shift + T	Connect selected
Ctrl + C	⌘ + C	Copy to clipboard
Ctrl + X	⌘ + X	Cut to clipboard

Ctrl + Shift + G	⌘ + Shift + G	Delegate sub project to..
Ctrl + D	⌘ + D	Disconnect selected activities
Ctrl + Right	⌘ + Right	Expand all under sub project
Ctrl + G	⌘ + G	Go to task/item in project view
Ctrl + Shift + X	⌘ + Shift + X	Go to item in Hierarchy view
Ctrl + Shift + C	⌘ + Shift + C	Go to item in Wall view
Ctrl + Shift + V	⌘ + Shift + V	Go to item in Priority view
Ctrl + I	⌘ + I	Import Hansoft XML
Tab	Tab	Indent selected activities
Ctrl + M	⌘ + M	Insert milestone
Ctrl + N / Insert	⌘ + N	Insert new activity / item
Ctrl + U	⌘ + U	Insert scheduled sub project
Ctrl + L	⌘ + L	Link tasks to nearest milestone
Ctrl + Shift + P	⌘ + Shift + P	Link to multiple milestones
Ctrl + Shift + B	⌘ + Shift + B	Link to task/item/bug
Ctrl + Shift + Up / Down (Alt Gr + Up / Down)	⌘ + Shift + Up / Down	Move items/tasks vertically
Ctrl + Q	⌘ + Q	Move selected items to current sprint or backlog
Ctrl + B	⌘ + B	Open backlog
Ctrl + Shift + R	⌘ + Shift + R	Open reports dialog
Ctrl + V	⌘ + V	Paste to clipboard
Ctrl + P	⌘ + P	Print
Ctrl + Y	⌘ + Y	Redo
Ctrl+Enter	⌘ + Enter	Reply to/post reply comment
Ctrl + K	⌘ + K	Save schedule in project history
Ctrl + A	⌘ + A	Select all activities
Ctrl + Shift + H	⌘ + Shift + H	Set hyperlink on selected
Ctrl + S	⌘ + S	Show activity in timescale view
Ctrl + Number 1-9	⌘ + Number 1-9	Sort extra column 1-9 numeric
Ctrl + T	⌘ + T	Sort selected by start date
Ctrl + W	⌘ + W	Switch between agile and task scheduling interface
Ctrl + F	⌘ + F	Switch find window
Ctrl + Shift + O	⌘ + Shift + O	Toggle ghost user mode
Ctrl + Z	⌘ + Z	Undo
Ctrl + O	⌘ + O	View options
Ctrl + J	⌘ + J	View project history
Ctrl + Shift + S	⌘ + Shift + S	View selected only

List of keyboard shortcuts sorted by keyboard key

Alt Gr + up/down		Move items/tasks vertically
Ctrl +	⌘ +	Expand all under sub project
Ctrl+Enter	⌘ + Enter	Reply to/post reply comment
Ctrl +	⌘ +	Collapse all under sub project
Ctrl + Shift + up/down	⌘ + Shift + up/down	Move items/tasks vertically
Ctrl + A	⌘ + A	Select all activities
Ctrl + B	⌘ + B	Open backlog
Ctrl + C	⌘ + C	Copy to clipboard
Ctrl + D	⌘ + D	Disconnect selected activities
Ctrl + F	⌘ + F	Switch find window
Ctrl + G	⌘ + G	Go to task/item in project view
Ctrl + I	⌘ + I	Import Hansoft XML
Ctrl + J	⌘ + J	View project history
Ctrl + K	⌘ + K	Save schedule in project history
Ctrl + L	⌘ + L	Link tasks to nearest milestone
Ctrl + M	⌘ + M	Insert milestone
Ctrl + N / Insert	⌘ + N / Insert	Insert new activity/item
Ctrl + Number 1-9	⌘ + Number 1-9	Sort extra column 1-9 numeric
Ctrl + O	⌘ + O	View options
Ctrl + P	⌘ + P	Print
Ctrl + Q	⌘ + Q	Move selected items to current sprint or backlog
Ctrl + R	⌘ + R	Add more users to activity
Ctrl + S	⌘ + S	Show activity in timescale view
Ctrl + Shift + A	⌘ + Shift + A	Arrange selected tasks
Ctrl + Shift + B	⌘ + Shift + B	Link to task/item/bug
Ctrl + Shift + C	⌘ + Shift + C	Go to item in Wall view
Ctrl + Shift + G	⌘ + Shift + G	Delegate sub project to..
Ctrl + Shift + H	⌘ + Shift + H	Set hyperlink on selected
Ctrl + Shift + Number 1-9	⌘ + Shift + Number 1-9	Arrange extra column 1-9 numeric
Ctrl + Shift + O	⌘ + Shift + O	Toggle ghost user mode
Ctrl + Shift + P	⌘ + Shift + P	Link to multiple milestones
Ctrl + Shift + R	⌘ + Shift + R	Open reports dialog
Ctrl + Shift + S	⌘ + Shift + S	View selected only
Ctrl + Shift + T	⌘ + Shift + T	Connect selected
Ctrl + Shift + V	⌘ + Shift + V	Go to item in Priority view
Ctrl + Shift + X	⌘ + Shift + X	Go to item in Hierarchy view
Ctrl + T	⌘ + T	Sort selected by start date
Ctrl + U	⌘ + U	Insert scheduled sub project
Ctrl + V	⌘ + V	Paste to clipboard
Ctrl + W	⌘ + W	Switch between agile and task scheduling interface
Ctrl + X	⌘ + X	Cut to clipboard

Ctrl + Y	⌘ + Y	Redo
Ctrl + Z	⌘ + Z	Undo
Tab	Indent selected activities	